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ABSTRACT

This manual is designed to train an in-house steering committee to design and implement a comprehensive, ongoing, worker-driven, workplace learning program. The seven chapters take the projected committee through a full-cycle design process. Each chapter includes an overview, a list of objectives, and a series of action steps to follow, and a mastery process that supports the chapter theme from an entirely different perspective. Mastery processes introduce a larger view, provide inspiration, and offer a variety of tools for personal and group mastery. Chapter 1 orients the group to four major themes important to an understanding of educational activities in the workplace: workplace trends, master learning, literacy, and workplace skills. Chapter 2 describes the steps needed to develop the steering committee into an effective working group. Chapter 3 shows the steering committee how to organize a needs assessment. Chapter 4 offers an array of options to help the steering committee narrow down choices for learning components to suggest to Learning Initiative Teams (LITs). Chapter 5 explores the nature and function of an LIT and offers pointers for creating guidelines for the formation of the teams that will inaugurate the workplace learning program. Chapter 6 links the steering committee and LITs to educational service providers. Chapter 7 leads the steering committee through implementation of the first cycle of LIT activities and its evaluation. Appendixes include a glossary and directories of educational service providers in Central Ohio and of organizations with workplace learning programs. Contains 39 references. (YLB)

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**BECOMING
MASTER LEARNERS
IN THE WORKPLACE
WORKFORCE DEVELOPMENT
THROUGH
LEARNING INITIATIVE TEAMS**



Meg Freeling

**Coordinator
Workplace Literacy Project**

**EASTLAND VOCATIONAL SCHOOLS
ADULT EDUCATION**

1993

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FOREWORD

The Eastland Vocational School District is pleased to have a leadership role in a workplace literacy project sponsored by the Job Training and Partnership Act (JTPA), through the Ohio Department of Education, Division of Vocational and Career Education. The Eastland district served as the administrator of the JTPA grant to develop a manual to help business and industry implement workplace literacy and learning.

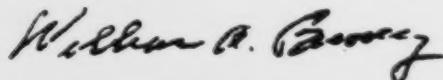
The result of months of study, interviews, research and recording is this document, Becoming Master Learners in the Workplace. The manual is designed for use by statewide businesses and industries that care about improved and/or continued quality of products and services -- both linked closely with ongoing learning by employer and employee, as addressed in the pages that follow.

Project coordinator, Meg Freeling, and the committee of experts she assembled to give input to the project, are to be commended for their work. Under the strong leadership of Freeling, the committee looked at the issue of workplace learning from every angle. They sought to eliminate barriers and present a plan that could be followed successfully by all. No stone went unturned. The diligence of this quality group of individuals is indeed reflected in this working document.

Think of future business and industry achievements as you read this manual. Think of the individual and organizational prosperity and fulfillment that can result from following this plan.

Feel free to contact the Eastland Vocational School District, Adult Education Division, for clarification or assistance in the implementation. We can help you get started and provide education and training services. On behalf of the Eastland district, I wish you good luck and success!

Sincerely,



William A. Bussey
Director
Adult Education
Eastland Vocational School District

It is the policy of the Eastland Vocational School District that educational activities, employment, programs, and services are offered without regard to race, color, national origin, sex, religion, handicap, or age.

BECOMING MASTER LEARNERS IN THE WORKPLACE

WORKFORCE DEVELOPMENT THROUGH LEARNING INITIATIVE TEAMS

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ADVISORY COMMITTEE

The following people have served on the advisory committee for this document, which was created through the Eastland Vocational School District's Workplace Literacy Project. Their direction, feedback, inspiration and support has provided the context through which the creation of this manual was made possible. Many thanks!

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Columbus, Ohio
March 1993

Meg Freeling

EXECUTIVE SUMMARY

"Forget your old, tired ideas about leadership. The most successful corporation of the 1990's will be something called a learning organization."

- Fortune Magazine, 1990

Becoming Master Learners in the Workplace: Workforce Development through Learning Initiative Teams is a manual for training an in-house steering committee to design and implement a comprehensive, on-going, worker-driven, workplace learning program.

PURPOSE

The workplace learning program created through the steering committee process described here has the potential for flexibility, strength and sustainability. The kinds of learning it engenders can empower employees to participate more actively in quality improvement efforts. It frames literacy and basic skills development into a larger context of workplace learning, thus laying a foundation for the emergence of a fully participative learning organization.

THE STEERING COMMITTEE

The steering committee is composed of hourly, staff and management representatives and is the central feature of this approach to developing a worker-driven workplace learning program. It is designed to model a flexible organizational structure that can respond both to the employee-learner's needs for safe space, relevance and self-initiative, and to the larger organization's needs for timely, dependable, quality production.

The steering committee will:

- Design a workplace learning program that responds to individual and group learning needs throughout the plant/office
- Establish a flexible structure for employees at all levels to initiate learning opportunities for themselves and their peers
- Create linkages with the surrounding community through educational service agencies and providers

- Encourage employees to initiate learning that
 - Expands their capacities to work effectively
 - Improves work processes, routines and structures
 - Enriches their own and others' quality of life
- Implement and support Learning Initiative Teams for each desired learning component

The steering committee is drawn from every department, group and organizational level so that the learning needs of all stakeholders and constituencies can be voiced and accommodated in the design of the learning program. Steering committee size can range from seven to fifteen members, depending on the organization's stakeholder configuration.

Members make an initial commitment to the steering committee for one year to implement this program. Steering committee work sessions are scheduled to fit with existing routines and obligations. Approximately 250 hours of steering committee training results in the establishment of multiple Learning Initiative Teams engaged in the first 6-8 week cycle of learning activities selected and shaped by each Team. Training hours include the time of a coordinating facilitator, a group process specialist, and a needs assessment and evaluation team (focus group facilitators and a literacy specialist). Hours are billed at locally acceptable consultant rates.

LEARNING INITIATIVE TEAMS

Learning Initiative Teams are introduced as a way to incorporate high performance management principles into training and development functions. By inviting learners to participate in learning activities as members of a self-regulating team, the organization accomplishes two things: (1) it provides an appropriate and necessary support system for the learner; and (2) it creates a structure for learning that can mesh with high performance design and production team processes.

Learning Initiative Teams help select their own educational service providers and contract with them separately, based on guidelines established by the steering committee.

BENEFIT TO YOU

By training a representative steering committee to create its own program, the organization develops a team of resident experts who learn to champion and sustain a Learning Initiative Team program which they helped to shape. In this way, workplace learning activities become woven into the fabric of organizational culture, and learning becomes an expected --and supported-- norm for everyone in the organization. The program will change the

manner and frequency through which organizational learning occurs. It increasingly enables Learning Initiative Teams to seek out and direct their own learning activities, and builds a foundation for integrating work and learning in the spirit of a true learning organization.

INTRODUCTION

Our present cultural, political and economic institutions are being challenged to re-structure themselves so that learning, healing and working can happen with renewed quality, dignity and balance.

What is the single, most effective thing an organization can do to bring this about?

It can transform itself into an organization of learners.

Employee-learners can keep an organization globally viable by developing unused abilities and by collaborating across levels to invent the new work, the new processes and the new social forms that will be necessary. Learning is not only the key to technological upgrading. It is also, more importantly, the key to organizational flexibility, total quality, and appropriate market response. And most important of all, learning can be the key to developing free human beings capable of transforming work into something that serves the genuine needs of all humanity and is worthy of workers' full capacities and gifts.

Workplace learning can serve as a fulcrum for mobilizing the organizational changes that must occur. A number of recent policy reports have confirmed the central role that education must play in the transformation of America's workforce. These include: "Workforce 2000," ASTD's "Workplace Basics," the AFL-CIO's "Worker-Centered Learning" guidebook, "The Myth of the Coming Labor Shortage," and "America's Choice: High Skills or Low Wages." After reviewing a number of these reports, AFL-CIO Education Director Tony Sarmiento noted that they all independently came to the same conclusion:

"Any major expansion in training will require 95% of American companies to abandon their currently-held ideas of work organization based on 'scientific management' and Taylorism, the practice of breaking complex work into a multitude of simpler, repetitive jobs. Only five percent of employers in the United States are currently practicing the ideals of a high performance work organization."

Based on these findings, most organizations are going to need a way to make that change. They will need a process through which to turn themselves inside out, in effect, so that the techniques of "scientific management" can gradually give way to what Peter Senge, author of *The Fifth Discipline*, and

others are calling the "learning organization."^[1*] According to Senge, the high performance work organization is the learning organization, for peak performers are the ones who keep learning new ways to stay at the forefront of innovation.

BECOMING MASTER LEARNERS IN THE WORKPLACE: Workforce Development through Learning Initiative Teams has been created to help organizations implement their own worker-driven literacy and learning program that can act as a seed for growing an internal structure capable of supporting the changeover to a learning organization as Senge defines it.

Tony Sarmiento, who has helped a wide variety of union organizations start workplace literacy programs, emphasizes the importance of paying attention to the choices that are made about *process* when implementing a program:

"Depending on who's involved, which program goals are selected, and what planning process is followed, a workplace literacy program can maintain outdated workplaces or foster high performance workplace structures."

If the steering committee engages in the processes recommended here, it will be able to design a workplace learning program that fosters high performance workplace structures.

BECOMING MASTER LEARNERS IN THE WORKPLACE stands at the juncture of several different streams of thought and activity that have traditionally operated independently and in isolation from each other, usually because of a felt need to consolidate their own identities, services and resources. These streams include: literacy agencies, vocational schools, mainstream public schools, human resource development and training professional groups, organizations implementing total quality control, and businesses transforming themselves into learning organizations. This process guide offers a blueprint for initiating dialogue between these groups to enhance the quality of learning in the workplace. It suggests incentives for replacing old walls and barricades between groups with new, more transparent windows. It offers an opportunity for people from the different streams, who have traditionally been cut off from each other, to see and access the abundance of new resources that are now available to all through a new synergism of the various streams responsible for workplace learning.

The workplace is now one of the new educational frontiers. It offers a practical context in which to transform learning. Unhampered, as yet, by the well-intentioned but strangling effects of government regulation, workplace

* All footnotes will be noted in brackets and listed at the end of the chapter.

learners have only to negotiate with their own organization's leaders and they can have the kinds of learning programs they want and need. The freedom of the American worker to shape his or her own learning is, at this point in time, almost limitless. However, this window of opportunity will not stay open forever. Now is the time to take advantage of the nation's growing awareness of the need for new attention to the skills and capacities of the workforce. Now is the time for employees and managers alike to take hold of the opportunity and create the new organizational forms and processes that will promote genuine learning and allow it to permeate and transform their organization's work.

Tony Sarmiento notes:

"Planning a workplace literacy program in a 'high skill,' high performance work organization is unlikely to be a top-down, prescriptive process. Instead, basic skills problems are recognized and handled through... a participatory process and structure.... In these high performance workplaces, the role of outside educators is not to conduct literacy audits, but to provide advice to a labor-management team responsible for developing an additional component to a larger, ongoing training program. Since both the employer and employees are committed to continuous training for all workers, regardless of skill level, mandatory testing of literacy skills is unnecessary and likely to be counterproductive to establishing or maintaining a workplace environment conducive to continuous learning."[2]

BECOMING MASTER LEARNERS IN THE WORKPLACE builds on Sarmiento's recommendations to guide an in-house steering committee through a process for setting up such a participatory, continuous-learning program.

In the past several years, through the Workforce Basics Consortium, as well as through Eastland Vocational School District's Adult Education Program where this workplace literacy and learning project was initiated, I have had the opportunity to participate in a variety of groups and projects where the issues of workplace education, organizational development, and the need for new approaches to workplace literacy have been central concerns. Each of the following groups brings its own perspective and makes a contribution that enriches the whole effort.

- In the Workforce Basics Consortium, there is a committed group of workplace educators, researchers, consultants and policy-makers who are concerned about the quality of workplace education and who see a

need to expand the scope and establish a new foundation for workplace learning efforts. These people come together around various initiatives, share and discuss new information, and chart courses of action that can benefit those organizations and individuals in the local community who are searching out ways for "transforming business as usual" through workplace education.

- In a coalition called **United for Adult Literacy**, there is an energetic group of literacy service providers who are beginning to adapt community- and volunteer-based literacy services into programs that meet the requirements of the workplace setting.
- Through the **Literacy Initiative** of Central Ohio, there is a group of community-minded citizens who have started raising money for literacy-related issues. Challenge 2000, the fund-raising campaign, was initiated by the CEO of Warner Communications, Inc. during the time that this cable TV company's corporate headquarters were located in Columbus. In the process of enlisting sponsors for the Challenge 2000 campaign, the community's awareness has been raised regarding the need for adult literacy and basic skills training. Corporate sponsors are, themselves, becoming interested in offering basic workplace education programs to their people.
- The local chapter of the **American Society for Training and Development** includes a vigorous group of organizational training and development professionals who see a role for themselves in promoting workplace basics as part of an expansion of employee education programs. Train America's Workforce is a national ASTD program that many local professionals actively support.
- An **African-American Literacy Task Force** is concerned with clarifying their culture's unique needs for literacy education and creating effective approaches to help people master basic skills in their own businesses and neighborhoods.
- The **Governor's Workplace Literacy Awards** has generated new interest in literacy by highlighting successful programs across the state of Ohio. Through the Ohio Bureau of Employment Services, there have been a number of seminars and workshops that bring people together around workplace education issues.
- Through information exchanges, industry networks, and their own ongoing need to make their workplaces more effective, a number of **Central Ohio business managers** are becoming sensitized to the role

that workplace education can play in developing a more talented, energized and versatile workforce.

These seven groups are some of the primary stakeholders interested in the improvement of workplace education in Central Ohio. All these groups are doing good work. We need a way to strengthen the interface between them and make it more transparent, so each group can tangibly benefit from the others' perspectives, insights and contributions. The groups need to orchestrate themselves so that all stakeholders in workplace learning efforts can exchange information, goods and services without creating additional hierarchical relationships. Rather, all groups need opportunities to freely respond to one another directly, and to set up focused, working relationships with each other without the burdens of unnecessary bureaucracy. If the workplace itself becomes an informed customer who initiates and drives the action, the other groups can respond with their appropriate services. As the different stakeholder groups learn a process for working together freely as equals, the interfaces between them become permeable membranes, instead of boundaries. Orchestration of stakeholder groups is achieved through a spontaneous, self-organizing interaction. As relationships between stakeholders become more open and transparent, workplace needs can be met more directly through collaboration. An abundance of resources becomes available as multiple service providers reveal their individual strengths in cooperative action. When the providers of educational services and support master this kind of orchestration among themselves, they will better be able to model collaborative learning for the employees they seek to serve.

We need a workplace learning program that can engage as many stakeholder groups as possible in interdependent, collaborative activity. As they work together to deliver learning services, a stimulus for quality improvement needs to be built right into the internal, core processes of the educational program, rather than introducing quality as an externally applied afterthought. This means the program must be responsive enough to be influenced and directed by learners' changing needs and motivations, as well as by the organization's changing strategies, goals and directions. We need a flexible program that can live with the ambiguities and unknowables, a program that can grow with the changes. And we need a way to engage as many players as possible, both from within the organization and from the various stakeholder groups in the surrounding community. This opens the program up to the rich and varied abundance of resources that are available to it.

Paul Jurmo, in his keynote address to participants at the JTPA Workplace Literacy Forum in May 1991, emphasized the importance of collaboration and pointed out the following:

"This collaborative approach is not an easy one, because it takes time, patience, and a cooperative spirit to get people together, to listen to what the various interest groups see as the goals of the program, and then to create a curriculum which builds on the positive motivations and knowledge base of all concerned. Although this is not an easy process, it holds great promise for not only creating meaningful curricula but also getting all the key players to buy into the program: They are more likely to support the process if they understand how the program relates to their interests." [3]

Workplace learning is an ecological challenge: we must find ways to keep from wasting human talent on all sides. Learners need to awaken, identify and strengthen their unused capacities. Educational consultants and service providers need to use and hone their skills for coaching and inspiring learners at every level. Organizations need to fully develop all their human resources. And community and government agencies need to channel their support services effectively.

Ralph D. Stacy, in his book, *Managing the Unknowable*, challenges managers to adopt a new mental model that acknowledges that we simply cannot know the future. He says,

"If managers could relax [their intense preoccupation with stability], ...they could open up their potential for creativity. But in order to do this, managers must accept that the future direction of their organizations is unknowable. This means that no one can have control of that future direction; rather, *the direction will emerge from the spontaneous, self-organizing interaction between people.* [4] The process of letting strategic direction emerge on its own is an exciting but unpredictable voyage of discovery – not a safe, predictable package tour.

In reality, success for an organization does not depend on choosing stable equilibrium over explosive instability; it emerges from a third condition that can be called *bounded instability*. Managers who intuitively understand this third state are not confined to tired old patterns of repetition and imitation." [5]

Through the activities that follow in this process guide, the steering committee has the opportunity to design a learning program that can operate under that third condition of *bounded instability* to allow learners to create meaningful learning tasks for themselves.

BECOMING MASTER LEARNERS IN THE WORKPLACE offers a blueprint for organizational learning. It promotes an approach that allows the participants who receive literacy and learning services to be able to influence how that learning will take place. Those most affected by a policy or program become the ones to have the strongest voice in shaping it. Learners become the customers. Customers are empowered and supported to produce their own most desired product -- a particular kind of learning opportunity. The result is mastery -- on their terms. This benefits the organization, for it helps produce free human beings capable of independent thought. When independent thinkers freely choose to pour their energies into an organization whose aims and trustworthiness they respect, another whole dimension of creative force is unleashed for the good of the whole enterprise.

I had the opportunity to help create the Workforce Basics Consortium's first slide presentation, used to introduce people to some of the issues surrounding the changing workplace and the need for a different kind of educational response to those changes. In the process of presenting that program to different organizations, I learned that many people were aware of the changes and of the need for a new educational response. What was missing was a practical process for making the change from the old to the new. What is it that we actually do differently if we are going to deliver the kind of employee education that is now required?

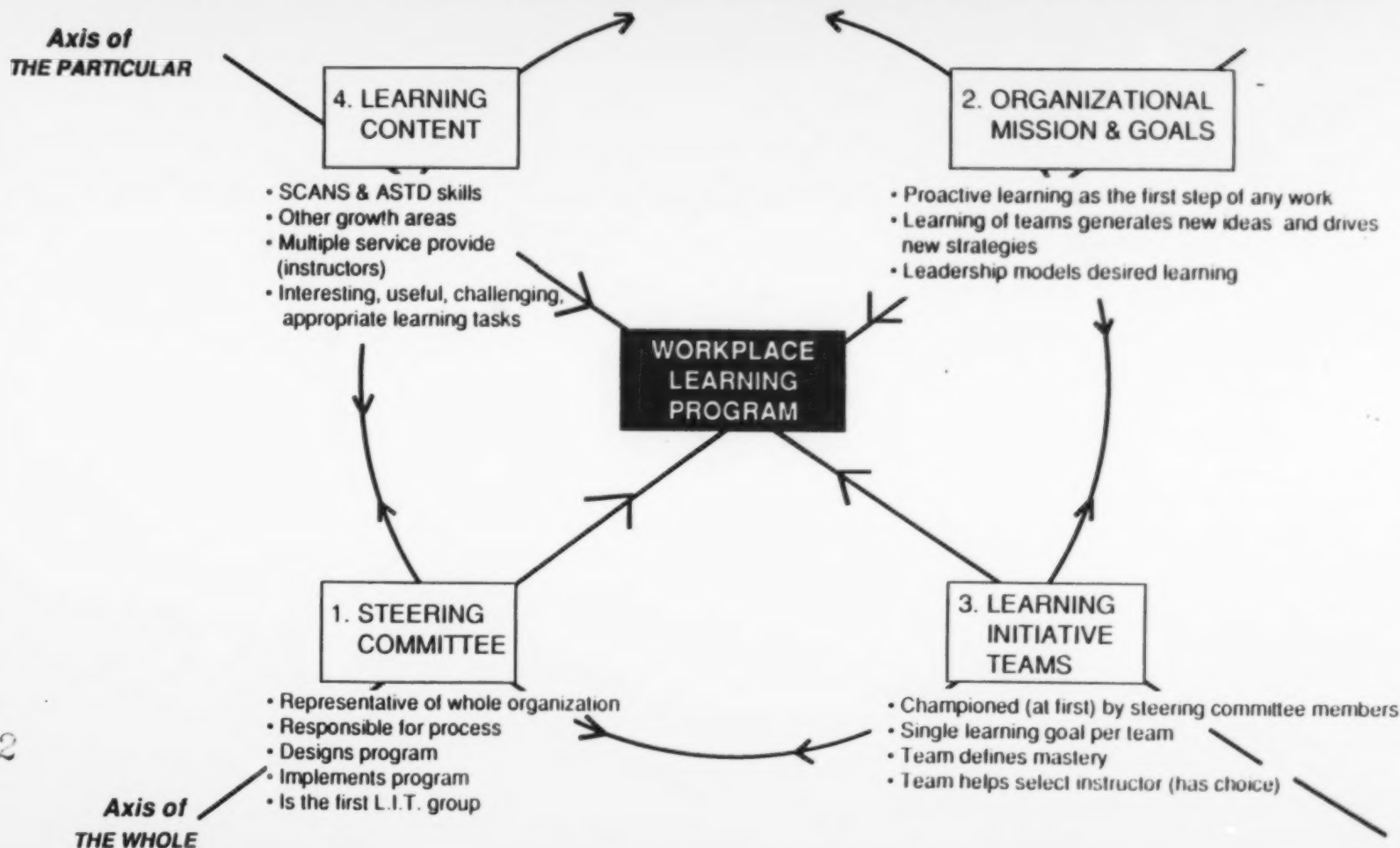
This process guide provides one answer to that question: we mobilize and free learners to initiate the demands for learning tasks that will bring multiple service providers into action from other parts of the organization and the surrounding community. We create multiple Learning Initiative Teams within the organization and empower them to set their own learning goals, select their own service providers, and master their learning proactively. We orient service providers to a process for building the learning teams into increasingly autonomous units, so that providers report more directly to learning teams themselves, customizing everything to each team's goals and desired approach. We encourage teams to link their spontaneously generated learning needs and tasks with the organization's ongoing strategies and goals, so the learning teams can integrate themselves into the life and work of the company.

The accompanying diagram charts the major relationships that need to be established in order for this program to be effective. The **workplace learning program** (center) is the result of a dynamic interplay between the four elements shown on the circumference of the circle. There is an ongoing dialogue that needs to occur between (1) the **steering committee** that designs and implements the workplace learning program, and (2) the **leadership** of the organization that sets overall mission, goals and strategies. This dialogue becomes the "axis of the whole." Cutting across this axis is another ongoing dialogue between (3) individual **Learning Initiative Teams** and (4) the individual service providers who will bring to them the **learning content** they wish to master. This second dialogue creates an "axis of particulars." Each Learning Initiative Team will set its own learning goals and determine its own direction and approach. As learning clusters get more varied in content and participation, there is a stronger chance that winning ideas will be generated from the learners in the process of their learning -ideas that positively affect the goals and outcomes of the whole organization.

The workplace learning program becomes most effective at the crossing point where the dialogue of the whole organization and the dialogue of the particular learning teams converge. Here is where opportunities for generating new learning are the greatest for both individual and organizational development. By keeping this picture of the whole in mind, steering committee members can engage in the design process with confidence to create a dynamic and integrated workplace learning program.

BECOMING MASTER LEARNERS IN THE WORKPLACE

WORKFORCE DEVELOPMENT through LEARNING INITIATIVE TEAMS



FOOTNOTES FOR INTRODUCTION

1. Peter Senge, *The Fifth Discipline: The Art and Practice of the Learning Organization*, Doubleday Currency, 1990.
2. Tony Sarmiento, "Do Workplace Literacy Programs Promote High Skills or Low Wages?" *Labor Notes*, Center for Policy Research of the National Governors Association, July, 1991.
3. Paul Jurmo, "Good News and Bad News about Workplace Literacy Efforts in the United States," Keynote Address at the JTPA Workplace Literacy Forum, San Antonio, Texas, May 3, 1991.
4. Meg Freeling.
5. Ralph D. Stacey, *Managing the Unknowable*, San Francisco, Jossey-Bass, 1992, preface.

HOW TO USE THIS MANUAL

The key to using this manual is a well-balanced steering committee, representative of the whole organization, with members willing to work together to design and implement a workplace learning program. With the help of a facilitator, this group works through the manual, using a learn-by-doing approach, to start and sustain an effective program.

The formation of the **steering committee** is very important. If there is a union in the organization, the steering committee formation needs to be a jointly-owned process from the start. And the workplace education program that results from the steering committee's efforts will also be equally owned and operated by both labor and management. Anything less tends to become a token gesture and is ineffective when it comes to fully engaging all the people for whom the learning program is designed. If there is no union present, there need to be staff, workers and front-line supervisors from all key departments participating equally with managers in the steering committee process. In addition, all cultures and distinct social groups within the organization need to be adequately represented on the steering committee. To be an effective design team, the steering committee becomes a microcosm of the whole, a little enclave of equality within the ordered hierarchy, co-existing as a special-case system to accomplish its task.

The seven chapters in this manual have been created to train the steering committee in certain program design and implementation skills. By working with a coordinating facilitator and following the suggestions given, the group will be able to design a customized workplace learning program that responds to the different learning needs that live uniquely in its particular organization.

Typically, a topic is introduced in the manual, and then members are asked to do something with that topic to further the program design process. This **cycle of learning and doing** allows steering committee members to gradually become in-house experts on the learning program, for they will know, better than anybody, how to make it work in their organization. This development of expertise, or mastery, is the key to the program's effectiveness with Learning Initiative Team participants, as well.

At the heart of the Master Learner approach is the **Learning Initiative Team**, the vehicle through which much of the learning takes place. Learning Initiative Teams are voluntary, autonomous groups of employee-learners who are taught how to set their own learning goals and organize themselves for mastery. They are coached to master not only the content they want to learn, but also their own group process as a team of learners. Each Learning

Initiative Team has the opportunity to become a group of experts on the learning themes and processes members choose to master together.

The steering committee is, in effect, the first Learning Initiative Team. To the degree that committee members learn to implement their mastery of the program design process, to that degree will they be able to help the new learning teams pursue their respective learning goals. By modeling the kinds of learning desired of future participants, the steering committee becomes more and more able to interest and attract the different groups of people for whom the program is designed.

Each chapter in this guide includes an **Overview**, a list of **Objectives** and a corresponding series of **Action Steps** to follow. Most of the action steps provide workboxes where steering committee members are asked to write key points and summarize implementation decisions that the group has made. **The book is designed to accompany and guide an interactive group process.** Most of the activities require a sharing of ideas through lively group discussion and dialogue in order to accomplish them. The second chapter gives a number of tools for creating this kind of interaction. The best program design will emerge when the group discovers ways to value and integrate divergent perspectives into the design process. If, for some reason, all the recommended action steps cannot be followed, the group needs to examine the objectives for the skipped steps and design alternative ways of accomplishing them.

Each chapter also includes a **Mastery Process** that supports the chapter theme from an entirely different perspective. Mastery Processes introduce a larger view, provide inspiration, and offer a variety of tools for personal and group mastery. Mastery Processes bring in non-linear learning activities to offset and balance the focused, straightforward thinking that is required to work through the action steps of the manual. Mastery Processes mobilize your thinking, engage you in discovery, experiment, art and playfulness, to throw new light on the chapter themes from unexpected vantage points. They disarm you so you can be more creative, challenge you to break out of old thinking habits, and seek to engage you through some of your own less-used capacities for learning. Mastery Processes are also a reminder that learning almost always happens in more than one way!

The seven chapters of the manual take the steering committee through a full cycle design process. When you reach the end, you are ready to begin again.

Chapter One orients the group to four major themes important to an understanding of educational activities in the workplace: workplace trends, master learning, literacy, and workplace skills.

It introduces some of the issues relevant to workplace learning and invites steering committee members to engage with those issues.

Chapter Two develops the steering committee into an effective working group. Processes for honoring everyone's input, building consensus, creating an effective flow of information, solving problems and engaging in program design are introduced. The group is asked to develop a mission statement for the kind of workplace learning program they would like to implement in their organization.

Chapter Three helps the steering committee organize a needs assessment that works with volunteers from a number of employee and management stakeholder groups to determine what people in the organization most want and need to learn. The steering group conducts peer interviews. It also arranges for focus groups of volunteers facilitated by outside group process specialists. The steering committee works closely with outside facilitators to collect work documents and discover required skill levels for a sampling of existing jobs. The group also arranges for outstanding employees to be "shadowed" by a specialist so that functional skills can be observed in actual use. All this information is collected into an Educational Profile and presented to the steering committee by the coordinating facilitator.

Chapter Four helps the steering committee look at an array of options to help narrow down choices for learning components to suggest to Learning Initiative Teams. The Educational Profile from the needs assessment is reviewed in light of recently published recommendations for what to include in a workplace skills program. The organization's mission and improvement goals are considered. The steering committee is then asked to recommend learning components for consideration by the first Learning Initiative Teams.

Chapter Five introduces Learning Initiative Teams as potentially autonomous groups who participate in assessing their own learning needs, determine their own learning goals, select their own service providers, and master skills according to best practical methods that they themselves help create. Learning Initiative Teams are the primary "vehicle" through which the workplace learning in this program takes place. The

characteristics and functions of a Learning Initiative Team are examined. The steering committee identifies benefits of joining a learning team and develops guidelines for starting teams. Steering committee members are asked to "champion" the first Learning Initiative Teams. A Learning Initiative Team orientation process is designed and the first teams are formed.

Chapter Six links the steering committee and the Learning Initiative Teams to educational service providers who can help guide and support the learning that goes on in each team. The steering committee is asked to get acquainted with a number of different educational service providers in the local community. Steering committee members decide on criteria for working with the Learning Initiative Teams to select service providers, and prepare a way to orient service providers to the program. They also work out a way to involve the selected service providers in the steering committee process.

Chapter Seven leads the steering committee through implementation of the first cycle of Learning Initiative Team activities and its evaluation. Individual learner assessments are handled by each service provider within each Learning Initiative Team. The steering committee monitors team activities and assists team members wherever necessary. Communication linkages with supervisors are set up. Committee members design evaluation activities and organize the collection of necessary data from the various stakeholder groups. The program is evaluated with outside assistance. The steering committee uses the evaluation report as a basis for planning the next learning cycle.

The manual contains a **glossary** at the end to help with unfamiliar terms and words and phrases that have specialized meanings.

At the end of Chapter Two, a special process is included that can be used individually and as a group to help you chart your own learning. The "Discovery and Intention System" was introduced by David B. Ellis, in his college survival text, *Becoming a Master Student*. The revised version that appears here was used in an adult training program on collaborative influencing. It is offered as a tool that can serve as a feedback system for seeing where you are and where you need to go at any point along the way of the design process. The system is simple enough to remember anywhere and profound enough to be useful in complex situations. It can also act as a

direction-finder to help the group get back on target when the discussion tends to wander off course for too long.

For Further Reading offers resources in a variety of related topics so you can pursue in more depth the things that particularly interest you. Because this type of manual takes one specific process approach, there is much good work by others that has not been mentioned. Some of it is included in this list.

When starting new programs, many people like to check with organizations who are doing something similar in order to learn from their experiences. We've included a list of companies and other organizations who are currently offering some kind of workplace literacy or basic skills program to their employees. This list is offered as a sampling, and no attempt is made to identify the nature or quality of the programs offered.

Also included is a list of Central Ohio educational service providers who can deliver some of the services your Learning Initiative Teams might be needing. This list is by no means exhaustive, but it can provide a place from which to start your own investigations.

CHAPTER 1. ORIENTATION

- WORKPLACE TRENDS
- MASTER LEARNING
- LITERACY
- WORKPLACE SKILLS

"The future now belongs to societies that organize themselves for learning."

Marc Tucker & Ray Marshall
Thinking for a Living, 1992

"Organizations learn only through individuals who learn."

Peter M. Senge, The Fifth Discipline:
The Art and Practice of the Learning Organization, 1990

OVERVIEW

BECOMING MASTER LEARNERS IN THE WORKPLACE focuses on the delivery of employee education. It gives tools for creating a workplace context in which the self-initiated learning of employees can drive both individual development and organizational change and growth.

In this chapter, you will be given an orientation to workplace education in the light of recent and ongoing changes: demographic and organizational changes, as well as changes in the scope and purpose of workplace literacy and learning efforts. **Mastery Process #1** suggests that certain ideas can be used as powerful tools. One such tool is the idea of the "cathedral builder." This idea essentially says that a steering committee or task force can team up to infuse its work with higher and higher quality, just as the medieval cathedral builders did when they created the cathedrals at Chartres and Notre Dame. They built cathedrals as ongoing expressions of the highest good they could imagine. **Mastery Process #1** challenges you to capture that same spirit as you design a workplace learning program.

The tasks of the steering committee, are to design and implement an employee-driven workplace learning program that can engage the various individuals and groups that work in this organization. The purpose of this manual is to train you in the use of some of the tools of program design and group process that can help you do your job better. Organizational learning requires a dynamic, interactive group process. The activities in this guidebook are designed to help you practice that interactive process while you do the work of creating a customized learning program. *BECOMING MASTER LEARNERS IN THE WORKPLACE* provides a number of opportunities for you to develop your own learning masteries in the process of designing a master learner program for your peers. In the end, it will be

your efforts as a team of learner-designers that will make this program successful.

OBJECTIVES

1. Discover the workplace trends that influence present and future employee education efforts.
2. Understand what is meant by master learning, and see it in an educational context that makes sense for the workplace.
3. Develop an appreciation for literacy, what it is, what it isn't, and how best to promote becoming more literate in the workplace.
4. Gain an overview of the spectrum of workplace skills that employers are asking their employees to develop for long-term success in high performance companies.

ACTION STEPS

ACTION STEP 1. WORKPLACE TRENDS

Gain an overview of workplace trends that will affect the design of a learning program.

"The problem with the U.S. is that there are too many people in college and not enough qualified workers. The U.S. has outstanding universities, but it is missing its middle. Too much training takes place on the job, and therefore is too unsystematic.

"Following Joe around,' the American system of on-the-job training, simply isn't a system. The resulting skills are very narrow and do not lead to workers who can absorb new technologies."

- Lester Thurow, Economist
Head to Head: The Coming Economic Battle
among Japan, Europe and America, 1992

"Global economics does not speak to the public need for meaningful work, affordable housing, fulfilling education, adequate medical care, a clean environment, honest and accountable government, social and cultural renewal, or simple justice. All global ambitions are based on a definition of productivity and the good life so alienated from common human reality I am convinced it is wrong and that most people would agree with me if they could perceive an alternative."

- John Taylor Gatto
New York City & State Teacher of the Year, 1991
Dumbing Us Down: The Hidden Curriculum
of Compulsory Schooling

Four Trends

Here are four significant workplace trends to consider when implementing a successful workforce learning program.

- A. **Populations** in the workplace are changing. The workforce is aging; 75% of the workers who will be on the job over the next ten years are already in the workforce. New entrants to the workforce will include much higher percentages of women, minorities and immigrants.
- B. **Customer expectations** for workplace products are changing. Companies selling to overseas customers have to meet a wider variety of national and regional product standards. Domestic standards are changing, as well. Diverse cultural groups become specific markets with unique needs. To meet these changes in market demand, companies now have to pay attention to a greater need for 1) customization, 2) convenience, 3) quick turnaround from source to sale, and 4) higher quality.
- C. In order to meet new customer demands, companies are changing **fundamental work processes**. In manufacturing companies, traditional assembly line production (called "Taylorism"[1*]) is proving inadequate for new customization requirements because it isn't flexible enough. Mass production, as we've known it, is giving way to other types of production that are "leaner"[2] and more responsive to the marketplace. Quality control is becoming everyone's responsibility and happens in every phase of the production process, rather than just at the end of the line. For work to flow freely through the system, there is a need to eliminate excess inventories. This requires new attention to the relationships between work stations and the interdependencies that exist between resource supply, production, distribution and consumption.[3] In service industries, such as banking, insurance and communications, the need for customization and convenience is driving new products, services and work arrangements, as well.
- D. To implement new work processes, companies are changing their **organizational structures**. Traditional hierarchies are being flattened to allow for more front line decision-making. Competition between individuals is now often counter-productive; team work and collaboration among all groups with a stake in the results are proving more effective. Employee isolation within one

* All footnotes will be noted in brackets and listed at the end of the chapter.

specialized job task is no longer considered an effective use of human resources. Full-spectrum training and cooperative work teams are being introduced so that employees can understand and participate in the whole production process and be able to perform a variety of tasks as needed to see a product through to completion.

Here is a chart developed by Sondra Stein and Laura Sperazi comparing traditional and high performance work organizations. This chart shows the relationship of the above trends to employees' work and learning. The authors point out the importance of recognizing that both the traditional and the high performance organizations are self-consistent, whole systems. Even though few companies would fall completely in one category or the other, education and change must be introduced in a way that honors the integrity of the primary organizational system that is now operating.

WORKPLACE EDUCATION IN CONTEXT [4]

A CHART COMPARING TRADITIONAL AND HIGH-PERFORMANCE WORK ORGANIZATIONS

<u>Traditional Organization</u>	<u>High-Performance Organization</u>
Emphasis on large-lot manufacturing.	Emphasis on customization.
Build inventory.	Build to order.
5-10 year period from research/product development to introduction of new product.	Shorten turn-around times.
Infrequent new product introduction.	More frequent new product introduction; more product variety.
Focus on ultimate customer.	Focus on chain of customers (each customer produces for next station in line).
Scientific management approach (Taylorism): goal is to break complex jobs into simple role tasks which worker can repeat with machine-like efficiency.	Continuous improvement approach: goal is to involve every member of workforce in process of improving quality, efficiency and customer satisfaction.
Emphasis on cutting costs.	Emphasis on growth in productivity.

Major mechanism for impacting productivity: add/subtract hours; speed-up for more work/hr.

View of Work Organization

Chain of command hierarchy.

Multiple levels of management necessary.

Management functions to control workers, maintain status quo.

Management treats employees as "hands."

Worker is not a whole person (check brains at door).

Work performed on line, by individuals working on tasks alone.

Worker's job is to follow same procedures at an established pace.

Emphasis on repetition.

Premium on worker reliability, steadiness, willingness to follow directions.

Workers expendable, interchangeable.

Cost-driving factor, therefore workers fear that improvements will lead to elimination of jobs.

Major mechanism for impacting productivity: no rework for work/hr.

Emphasis on elimination of waste through over-production, storage, transportation, defects, motion, unnecessary processing.

View of Work Organization

Participatory management style.

Fewer layers of management.

Management functions as "coach."

Management treats workers as "partners in prosperity," people with solutions who deserve respect.

Worker is a whole person (head and hands).

Work done in self-managing work cells, by individuals working on teams.

Worker's job is to continuously improve his/her part of the process in relation to the whole: to better meet needs of customer (next step in production process).

Emphasis on problem-solving.

Premium on worker inventing new ways to eliminate waste, do job more efficiently.

Workers respected as equals with managers, valued according to contributions.

Role of Workplace Education

Company does not have long term strategy that integrates education and training into overall business plan.

Company distinguishes between education and training for management and line workers.

Goals for education and training are short-term, problem-centered (let's fix it!).

Return On Investment (ROI) for plant is long term, for education, short term.

Workplace education is remedial; focuses on filling gaps in workers ability to perform job-specific skills.

Presumed conflict between education and production (workers not given release time for participation).

Workplace Education is preparation for action.

Development and Implementation of Workplace Education Program

Top management not invested in goals and outcomes of workplace education programs.

Neither workers, supervisors, nor unions involved in process of planning, implementing, and evaluating workplace program.

Decision on what and who to teach are based on audit of job- and task- specific deficits.

Testing is separate from instruction.

Content of instruction tends to be narrowly job specific (split between individual as worker and learner).

Role of Workplace Education

Education and training conceived as part of long term strategic plan for continuous improvement.

Company puts a premium on "developing and realizing the full potential of entire workforce."

Goals for education are long-range as well as short term (remedial plus).

Return on Investment (ROI) for education is long term.

Workplace education is more than remedial; focuses on building skills for continuous improvement and flexibility (cross training) as well as job specific skills (education model).

No conflict perceived between production and education (education takes place over work time).

Workplace Education is Action.

Development and Implementation of Workplace Education Program

Top management invested in setting goals and outcomes for workplace education.

Participatory planning, implementation and evaluation process involving management, workers, union (where appropriate) and educators.

Decision on what and who to teach are based on company-wide continuous improvement goals and needs defined by specific work cells.

Testing is integrated into instruction.

Basic skills taught within framework that focuses on continuous improvement of skills.

Efforts to measure outcomes tend to be (1) self-reflective (focused on educational gains) and (2) insofar as focused on performance, look at short term job-specific skills gains.

No plans for institutionalization of program.

Company develops approach to measuring outcomes that focuses on impact on individual worker performance and on organizational goals.

Company has plans not only for institutionalization but also for better integration of education into on-the-job practices.

Clarify for yourselves the ways in which your own organization has been affected by the above workplace trends. In the spaces provided below, finish the statements with information you have gathered about trends in this workplace.

Worker Populations

Three changes I have noticed in our worker population over the years I have been here are...

- 1.
- 2.
- 3.

The trend that I see for this organization is...

Customer Expectations

Three changes I have noticed in our customers' expectations are...

- 1.
- 2.
- 3.

The trend I see for this organization is...

Fundamental Work Processes

Three changes I have noticed in our fundamental work processes are...

- 1.
- 2.
- 3.

The trend I see for this organization is...

Organizational Structures

Three changes I have noticed in our organizational structures are...

- 1.
- 2.
- 3.

The trend I see for this organization is...

Traditional and High Performance Organizations

This organization fits more closely with the ___Traditional ___High Performance Organization (check one) for the following reasons:

-
-
-

The trend I see for this organization's future is...

After completing the above exercise, compare notes with other steering committee members and discuss your observations. Then as a group, identify other people in the organization you would like to talk to in order to get a more complete picture of workplace trends in your organization. Arrange for this to be done so that results can be brought back to the group.

ACTION STEP 2.

MASTER LEARNING

Understand what is meant by master learning and see it in an educational context that makes sense for the workplace.

"Learning is not a task or a problem – it is a way to be in the world. Man learns as he pursues goals and projects that have meaning for him."

- Sidney Jourard

BECOMING MASTER LEARNERS IN THE WORKPLACE is based on the idea that the process of human learning is worthy of conscious mastery. Where children learn to master their relationship to the world through play, adults learn their respective masteries more often through work. Thus, the workplace offers an appropriate laboratory, not only for mastering new work skills, processes and team formations, but also for mastering the art of learning itself.

So how do human beings learn?

Differently, depending on age, temperament, personality dynamic, stage of development, and sense of destiny. Just as production technology is moving beyond a one-way, one-product, assembly-line approach into a new capacity for customization, so the art of education is moving beyond a one-way-to-learn, one-right-answer approach to learning. Educators are beginning to recognize that providing learning options and multiple routes to mastery is actually a more efficient way to develop the diversity of human talent that is present in any human gathering. Human beings learn not only as individuals, but also as pairs, and as groups.

How does this relate to the workplace?

Because human beings learn differently, and because many of our present educational structures are still based on the outdated assumption that we all learn the same, there is a great need to (1) create new social forms that simultaneously support different kinds of learning, and (2) develop new levels of tolerance and honor for people who learn differently from how we do.

Work organizations are in a unique position to benefit directly from such a renewal effort. By creating flexible new social forms for learning in the workplace, and by encouraging tolerance for multiple learning paths, the organization can release the human talent that will (1) make people want to work there, and (2) make the critical difference for sustaining the life of the company in the world marketplace.

What is learning?

Learning is the transformation of perceptual information into new capacities.

From the American Heritage Dictionary: Learning is "a relatively enduring change in potential behavior that results from experience."

Learning is what you do when you notice things and give new meaning to them, based on a deeper, experiential understanding of why they're important and how they affect you.

Peter Senge uses the term, "generative learning" to refer to the creation of something new -- new perceptions, meanings and directions. He says, "Learning, ...does not mean acquiring more information, but expanding the ability to produce the results we truly want in life. It is lifelong generative learning. And learning organizations are not possible unless they have people at every level who practice it."[5]

What is mastery?

According to David B. Ellis, author of the book, *BECOMING A MASTER STUDENT*, "This book is about something that cannot be taught. It's about becoming a master student." There is a distinction between "learning" and "being taught." Human beings have a built-in capacity to resist being taught anything. But learning is a different matter. Everyone has the ability to learn -- and to become a master at it.

The mastery we're talking about here is not about dominating anyone or anything. It's about a special level of proficiency that comes with practice. The master craftsperson turns skill into art -- an art that allows the best clay pots or fabrics to emerge from the workshop. "Similarly," says Senge, "personal mastery suggests a special level of proficiency in every aspect of life -- personal and professional."

Who are master learners?

Ellis relates mastery to Abraham Maslow's qualities of a self-actualized person. In Maslow's work to define psychological health rather than sickness, he listed traits he found in self-actualizing people such as Abraham Lincoln and Albert Einstein. Ellis says the following characteristics describe the master student. [6]

The Master Learner is:

Inquisitive	Courageous	Able to focus attention
Self-directed	Willing to change	Able to suspend judgment
Willing to work	Competent	Relaxed about evaluation
Intuitive	Joyful	Creative
Spontaneous	Energetic	Willing to be uncomfortable
Willing to let go of ideas	Well	Loving
Self-questioning	Willing to laugh	Responsible
Hungry	Willing to risk	Able to organize and sort
Willing to participate	Generalist	Willing to accept paradox

To develop your own clear picture of a master learner, review the above list of characteristics and do the following:

1. Underline the qualities you know you have worked to develop in yourself.
2. Check additional qualities you are attracted to in others.
3. Identify three master learners you know personally and list some of the outstanding master learner qualities of each.

MASTER LEARNERS I KNOW OUTSTANDING QUALITIES

Master learners have an inner awareness that there is something important they are here to do. They seek out learning opportunities that help them accomplish their mission.

What are some of the more important things you know you are here to do?

Master learners are people who have worked through the process of their own learning so thoroughly that they transform whatever comes to them into new capacities. Master learners grow best in a work environment where there's been a basic shift in attitude from an "instrumental" to a "sacred" view of people and work. People or objects are "sacred," in the sociological sense, when "apart from what instrumental use they serve, they are valued for themselves." Daniel Yankelovich, the pollster who has been taking America's pulse for forty years, has pointed out that a significant shift in public attitude has already occurred in this regard.[7]

Bill O'Brien, CEO of Hanover Insurance, describes the evidences of personal mastery that emerge in employees who have been part of an organization that has shifted its basic values to where "the fullest development of people is on an equal plane with financial success." He said:

"You know the system is working when you see a person who came to work for the company ten years ago who was unsure of him/herself and had a narrow view of the world and their opportunities. Now that person is in charge of a department of a dozen people. He or she feels comfortable with responsibility, digests complex ideas, weighs different positions, and develops solid reasoning behind those choices. Other people listen with care to what this person says. The person has larger aspirations for family, company, industry and society."[8]

Will master learners be welcome here?

Discuss the following questions with the steering committee:

If you develop a program that encourages people to become master learners in this organization, what present attitudes and practices will support your effort?

Which of the present attitudes and practices might have to change before support for the program is felt? Explain your answer and describe the changes you think would be most effective.

Identify three good things that might happen in your department if more of the people working there were master learners.

-
-
-

What are three things a person could do to start becoming a master learner?

-
-
-

ACTION STEP 3.

LITERACY

Develop an appreciation for literacy, what it is, what it isn't, and how best to become a more literate workforce.

"When I use a word," Humpty Dumpty said, in rather a scornful tone, "it means just what I choose it to mean--neither more nor less."

"The question is," said Alice, "whether you can make words mean so many different things."

"The question is, said Humpty Dumpty, "which is to be master--that's all."

- Lewis Carroll, Through the Looking Glass

- **Who Is Literate?**

To be literate has meant a variety of things to different people in different cultures through the ages, and its meaning continues to transform itself to meet the changing needs of our own time. In its broad sense, it has meant to be an author, well-versed in all the great works of literature in several different languages. In its narrow sense, it has meant to recognize words enough to be able to mechanically read sentences. Neither of these definitions fully fits the present situation in the workplace. Several definitions of literacy will be given in this manual, but the most important meaning will be the one you as a steering committee develop as you work out the kind of learning program you want to offer to your peers in this organization.

- **Community Literacy Agencies**

Community based adult literacy agencies have been around for several decades, using volunteers to help people improve basic reading, writing, speaking, math and problem solving skills. In Central Ohio, the Columbus Literacy Council has been providing these services for twenty-two years. A number of other community-based literacy programs, some of them linked into national networks, assist adults with language, math and other essential skills, as well. Each group has its own special approach. Most literacy service providers recognize the value of cooperating with each other as they work separately to carve out a niche for themselves among the different client groups whom they serve. Non-profit agencies solicit gift monies, deliver services through volunteer tutors, and charge minimal (if any) fees to clients. Community based literacy service providers see the workplace as a natural extension of their ongoing work.

- **Public Adult Education Programs**

Public schools have adult education programs that offer adults opportunities for basic skills upgrading. Vocational schools, city school districts and community colleges usually offer English as a Second Language (ESL), and General Educational Development (GED) preparation and testing through a state-funded program called Adult Basic Literacy and Education (ABLE). Some of their programs are free, some require tuition, and some are subsidized through local private industry councils and other funding agencies. In Columbus, there are Adult Basic Literacy and Education programs at Columbus State Community College, Columbus City Schools, Eastland Vocational Schools, and South-Western City Schools, as well as in other central Ohio districts. ABLE agencies are also beginning to develop programs for workplace literacy.

- **Literacy K-12**

Literacy has traditionally been the responsibility of a community's primary and secondary schools. In this time of fundamental change in the understanding of how schools need to operate and how children need to learn, sometimes a child's personal mastery of basic skills is the thing that falls through the cracks. With patience for the school systems that are working diligently to resolve the current dilemmas that have let this happen, workplace educators are recognizing a parallel need to face the present skill capacities of the workforce realistically and find new ways to work together with educational service providers to further develop the capacities and skills of working adults. Meanwhile, many work organizations are offering new services to schools to support teachers' growing desire to improve themselves. This relationship of mutual assistance and understanding can be very beneficial if it is developed with intelligence and sensitivity for the unique functions of each institution.

- **Workplace Literacy**

Workplace literacy is becoming a prerequisite for job success at all levels, and it is especially visible in globally competitive, high performance workplaces. Not only are basic skills needed by more of the workforce than ever before to perform new front-line job tasks, but higher mastery levels of the "old basics" (the 3 R's) are now essential, as well. On top of that, what's being called the "new basics" -- now considered by some companies to be standard learning for all employees -- ask for mastery of a wider spectrum of work skills including such competencies as resource management, interpersonal and team communication, and systems thinking. Workplace Literacy is coming to mean the whole spectrum of non-job-specific skills required for a successful work experience. (See the SCANS Report)

- **Deeper Assumptions**

There are tacit assumptions about literacy that go deeper than all of the trends and perceptions mentioned above. **To be literate in this sense is to generate and transform the knowledge needed to relate to self, group and the larger world through meanings that are commonly shared and valued.** If literacy is inappropriately forced or blocked, great damage, in terms of the real process of the individual's cultural development, can result. Cultural growth is often prematurely arrested, causing people great difficulty when trying to meet their full potential. This happens in children, and it also happens in adults. To reawaken the desire to learn sometimes means you are uncovering a wound that needs to be healed. This requires clear perception of each human being, and a delicate, sensitive touch. In this type of situation, working, healing and learning must go hand in hand.

Literacy is one of the building blocks of learning. According to Gary Lamb, editor of *The Threefold Review*, learning is a fundamental human freedom and should be protected by law along with freedom of religion and free speech.[9] Just as government does not dictate national goals for religion or the content of religious rituals, neither should it dictate educational goals, curriculum nor teacher qualifications, according to Lamb. These should be determined by the participants most closely affiliated with the learning endeavor. Freedom to learn cannot be coerced. In planning workplace learning programs, the spirit of individual freedom can be protected if adults determine their own learning goals and help shape their own best learning procedures.

Current Literacy Issues

Workplace Literacy is now "a growth industry within the education and training community." [10] As it has grown, and as more programs get developed, certain issues have emerged. Some deal with the assumptions underlying the need for workplace literacy. Others deal with how programs are developed and put into operation.

Here are some questions to talk over together regarding these issues:

Underlying Beliefs:

1. In talking about the need for workplace literacy, are you using language that depicts employees as being deficient or lacking in basic skills? According to ERIC (Educational Resources Information Center) Clearinghouse Director, Susan Imel, "Not only do such descriptions dehumanize workers, but they also fail to take into account the considerable skills and knowledge most bring to the workplace." [11]

How can you talk about literacy in a way that both honors people's present knowledge and encourages their future exploration and growth? Identify one specific action you can take:

2. In trying to understand global economic changes, are you unknowingly blaming the nation's economic woes on the skills shortages of your organization's workers, as some media reports suggest? Or do you lean toward the contrasting view that says "government policies and corporate practices are primarily responsible for the diminishing competitiveness of the U.S. workforce"? In discussions on the "costs of illiteracy," to business and society, workers are often blamed for large economic losses because of insufficient basic skills, yet the roles of organization and society in creating these losses need to be carefully considered, as well.

How can you work with all employee groups and departments to become, together, a more literate and educated organization? Specify one thing you can do now:

In developing and implementing a workplace literacy and learning program, key issues include:

- **Curriculum**

What should be taught? Who determines this? How much should workers be involved in determining curriculum? Should it be strictly job-related, strictly academic, or more broadly based? Who should develop the curriculum and on what should it be based?

- **Instructional Delivery**

What are the most effective methods of delivering workplace literacy programs? Should the approach be school-based or more closely aligned with the workplace? How do peer teaching and collaborative learning fit in?

- **Assessment**

How are learning needs appropriately assessed? Can standardized testing instruments effectively measure workplace-related skills and knowledge? What can be done to prevent assessment information from being misused?

- **Evaluation**

How can the outcomes of workplace learning programs be measured? Should the focus be on personal or workplace outcomes? What criteria should be used to determine success?[12]

The National Literacy Act of 1991 defines literacy as an individual's . . .

" . . . Ability to read, write and speak in English; compute and solve problems at levels of proficiency necessary to function on the job and in society; to achieve one's goals; and to develop one's knowledge and potential."

John Rheinfrank[13] of the Institute for Research on Learning in Palo Alto looks at literacy's emerging new meanings in terms of actual practice:

In the past, literacy meant:	Learned persons, from <i>literati</i> ("men of letters")
Presently literacy means:	Reading and writing (and math, with speaking, listening and problem-solving recently added in)
What literacy is becoming:	The continuum of creating, acquiring and transforming knowledge (<i>to complex masteries</i>)

The author of this manual sees literacy as a series of transformations:

Literacy is the transformation of action into speech, speech into writing, writing into meaning, and meaning into action.

Here is a space to write your beginning definition of literacy as it relates to work life in this organization:

For me, literacy is:

Group Activity

For the next 30 minutes, assume the following premise.

Premise: We choose to be a more literate workforce.

As a group, brainstorm: **What this choice to be a more literate workforce might look like in our organization.** Imagine what it would feel like, sound like and be like for you and your peers to actively work on becoming more literate, whatever that word means to you. Let ideas flow freely and make sure they all get recorded on a flipchart. Don't evaluate or criticize anything said, but go for quantity of ideas during this brainstorming session.

See the Brainstorming Guidelines in Chapter 2 on pages 54 - 57 before you begin.

ACTION STEP 4. WORKPLACE SKILLS

Gain an overview of the spectrum of workplace skills that employers are asking their employees to develop for long-term success in high performance companies.

"Our current obsession with skills reflects our deep commitment to technology and our fervent hope that technological approaches can solve our most perplexing problems.... The skills approach works well so long as we view life from a technological perspective.... Ultimately, however, this perspective proves too narrow."

- William Crain, Psychologist
"Skills Talk"

Perhaps at the root of the "skills talk" so prevalent today is a yearning for a framework and a foothold for exploring the new dimensions of human mastery we see on the horizon for the 21st century workplace. We call something a "skill" so we can get a handle on a part of our humanness that has, up to now, been elusive, nebulous or hard to understand. Not yet comfortable bringing the psychological and spiritual aspects of ourselves into the workplace, yet recognizing that high performance work communities cannot function without those dimensions, we tiptoe into the water by framing the thinking, creating, communicating, relating, visualizing and meditating parts of ourselves as "skills."

We build lists of these skills so we can remove ourselves from the nebulous "fog" and stand again on the familiar ground of "something to do." These skills lists become frameworks that help us find our way around in the new, uncharted territory that appears when we ask the soul and spirit parts of ourselves to consciously participate in "the high performance workplace," along with the familiar "head" and "hands" we've been bringing to work for years. Once the fog clears and we realize our new work is sacred, we won't be embarrassed to talk about things of the heart. Then "interpersonal skills" can again become "kindness," "team building" can become "a harmonious spirit," and "thinking skills" can become "wisdom." But until then, the "skills talk" serves a useful purpose. It is a bridge between the old and the new. It helps us become organizations that can experience the harmonious working together of fully functioning human beings.

The Mastery Process in this chapter focuses on the metaphor of building a cathedral as a way to help us view our work with new eyes. Skills frameworks can be seen as the scaffolding that gives people access to the new work of turning our organizations into "cathedrals." The new cathedral-building is about becoming social artists to create society's institutions anew. The skills scaffoldings are temporary structures we build using materials we recycle from our old way of doing things. As we discover what cathedral

building really requires and learn how to give the cathedrals their own new life and structure, the scaffoldings are no longer necessary and can come down.

Meanwhile, these lists of skills can be useful starting points for embarking on our respective people-building and organization-building projects. Specifically, they can help you decide on goals for some of the learning team activities you are here to design.

Scaffolding #1 ASTD's 7 Workplace Basics

Tony Carnevale of The American Society for Training and Development (ASTD) supervised a national study in 1988 called "Workplace Basics: The Skills Employers Want." This study did much to expand the idea of workplace skills to include, not just the "3 R's," but a broad spectrum of skills necessary for job success in the changing workplace. Below are the seven workplace basic skills areas that emerged from this study.

ASTD's Workplace Basics

- | | |
|-------------------------|--|
| 1. The Foundation: | Learning how to learn |
| 2. Competence: | Reading, writing and computation |
| 3. Communication: | Listening and oral communication |
| 4. Adaptability: | Creative thinking and problem solving |
| 5. Personal Management: | Self esteem, goal setting, and personal and career development |
| 6. Group Effectiveness: | Interpersonal skills, negotiation and teamwork |
| 7. Influence: | Organizational effectiveness and leadership |

The advantages of this list of basic workplace skills include:

- It is based on needed skills identified by employers
- It broadens the scope of workplace learning to include a whole range of human capacities
- It stresses the importance of training front-line workers in "management skills" such as teamwork, communication and thinking.
- It offers a simple structure for re-formulating a workplace curriculum.

Scaffolding #2 SCANS Workplace Competencies and Foundations

The SCANS Report from the U.S. Department of Labor Secretary's Commission on Necessary Skills (SCANS) has identified what they call **the know-how needed for solid job performance**. This comes in two parts: (1) Workplace Competencies and (2) Foundation Skills.

There are five Workplace Competencies identified:

As an effective worker, you can productively use:

1. **Resources** -- You know how to allocate time, money, materials, space, and staff.
2. **Interpersonal Skills** -- You can work on teams, teach others, serve customers, lead, negotiate, and work well with people from culturally diverse backgrounds.
3. **Information** -- You can acquire and evaluate data, organize and maintain files, interpret and communicate, and use computers to process information.
4. **Systems** -- You understand social, organizational, and technological systems; you can monitor and correct performance; and you can design or improve systems.
5. **Technology** -- You can select equipment and tools, apply technology to specific tasks, and maintain and troubleshoot equipment.

There are three Foundations identified:

Competent workers in high-performance workplaces need:

1. **Basic Skills** -- Reading, writing, arithmetic and mathematics, speaking, and listening.
2. **Thinking Skills** -- The ability to learn, to reason, to think creatively, to make decisions, and to solve problems.
3. **Personal Qualities** -- Individual responsibility, self-esteem and self-management, sociability, and integrity.

To discover the usefulness of these "skills scaffoldings," try the following:

Work in dialogue with a partner to (1) Describe **who now uses** each of these skills regularly under the present organizational structure. (2) If the goal is to get every person in the organization using all of these skills regularly, discuss any **barriers** you see that might prevent people from mastering particular skills. (3) Imagine and describe a **future scenario**: How might your work day change if these skills were mastered and used by all of the people you work with?

SKILL	WHO NOW USES	BARRIERS TO MASTERY
FUTURE SCENARIO OF "MASTERS AT WORK" IN YOUR WORK AREA -		

When you finish, share highlights from your dialogue with the whole group.

CONCLUSION

This concludes the orientation to the workplace and education issues that set the backdrop for designing a workplace learning program. The next step will be to shape yourselves into an effective steering committee that can lead out, organize and produce the results you want. The development of your group process, procedures and mission will be the focus of Chapter Two.

FOOTNOTES FOR CHAPTER ONE

1. "Taylorism" is the system of mass production perfected and championed by Frederick Winslow Taylor. Also called "scientific management," this system replaced the judgment of the individual worker by the rules and principles of the "science" of the job as were developed by management. Henry Ford, pioneer of the mass-produced automobile, was greatly influenced by Taylor. From *Thinking for a Living*, Marshall and Tucker, p. 5.
2. "Japanese manufacturing companies have been on the front lines of a trend that is spreading to the U.S. This is a trend that Womack, Jones and Roos described as "lean production" (as opposed to mass production). Lean production being able to produce truly customized products more effectively and efficiently, in less time, with fewer defects than by using traditional mass production (e.g., assembly line) techniques. Lean production involves a high degree of flexibility on the part of manufacturing systems and people integrated with those systems. Flexibility, in turn, is predicated on a high degree of skill within the workforce." From Workforce Basics Consortium slide presentation notes, Columbus, Ohio, 1991.
3. See the novel, *The Goal: A Process of Ongoing Improvement*, by Eliyahu Goldratt and Jeff Cox, Avraham Goldratt Institute, New Haven, CT, 1984.
4. This chart was developed by Sondra Stein and Laura Sperazi. Information was drawn from a wide range of resources, including: *Made in America; America's Choice; Application Guidelines for Malcolm Baldrige Quality Award; "Do Workplace Literacy Programs Promote High Skills or Low Wages?"* by Tony Sarmiento in *Labor Notes*; articles and discussion about United Electric Controls, including "Tradition and Change: The Role of Workplace Education in the Transformation of Workplace," an article in progress by Sondra Stein and Fred Ritzau; and research conducted by Laura Sperazi et al. for the Massachusetts Workplace Education Initiative, 1987-1991.
5. Peter M. Senge, *The Fifth Discipline*, N.Y., Doubleday Currency, 1990, p. 142.
6. David B. Ellis, *Becoming a Master Student*, Rapid City, SD, College Survival Inc., 1984, pp. 27-29.
7. Daniel Yankelovich quoted in Peter Senge, *The Fifth Discipline*, p. 144.
8. Bill O'Brien quoted in Peter Senge, *The Fifth Discipline*, p. 145.
9. Gary Lamb, "An Alliance of Government and Business Seeks to Mold American Education," *The Threefold Review*, Winter-Spring, 1992, p. 20.
10. Susan Imel, Director, ERIC Clearinghouse on Adult Career and Vocational Education, *Trends and Issues Alerts*, "Workplace Literacy: An Update," Columbus, Ohio, 1992.
11. *ibid.*
12. Issues and questions were developed by Susan Imel, ERIC, *Trends and Issues Alerts*, "Workplace Literacy: An Update," 1992.
13. John J. Rheinfrank, "Literacy: An Interpretation from Emerging Practice." Fitch RichardsonSmith, Worthington, Ohio, 1991.

MASTERY PROCESS #1 BUILD A CATHEDRAL

Ideas are tools. The question is not whether to believe in them, but how to test them out, put them to work, and see if they can help you produce the results you want. The idea of building cathedrals is such a tool. There are a number of people today who are interested in the idea of cathedral building, both literally, and as a metaphor for substantive organizational change.

Peter Drucker, author of several books on leadership, tells the story of three stone masons building a wall. A person walks up to the first one and asks, "What are you doing?" The mason looks up and responds, "I'm laying stone to earn my daily bread." The same question is put to the second worker, and he says, "I'm becoming the best stone mason in the land." When the third man is asked, "What are you doing?" he answers slowly and with deep joy, "I'm building a cathedral!"

Though it takes many different forms, this cathedral building impulse can be recognized by the following four harmonizing themes:

- Revive learning
- Restore meaningful work
- Re-establish genuine healing
- Re-awaken the arts

Cathedrals seem to be part of a bygone era, yet it is partly because they have slept so long that they now hold such fascination and promise for us. When we resurrect the cathedral idea, we can use it with freedom to shape our own organizations. It holds seeds of ideals that will lift our spirits and give us the new perspectives we need to transform our social and economic institutions into the kinds of flexible structures that will be necessary for the 21st century.

Emphasizing the need to shift from an exclusively materialistic and scientific focus to one that includes a social and artistic dimension, Christopher Schaefer, founder and president of Envision Associates says,

"In ancient times, the royal art was temple building; now and in the future, the highest art will be that of social creation — taken out of the realm of instinct and consciously practiced if we are to build a more creative, just and healing social world." [1*]

* All footnotes will be noted in brackets and listed at the end of the Mastery Process.

Modern cathedral building will not focus so much on bricks and cement, but on the social arts that will enable diverse peoples to create new ways to live and work together in harmony.

Chartres Cathedral

Chartres Cathedral is one of the world's most beautiful buildings. This "Mother Cathedral," the model for later cathedral building, stands on a high promontory surrounded by wheat fields, about fifty miles southwest of Paris, France. Masters and their pupils who lived and worked in Chartres during the golden age, from about 1000 to 1200 A.D., provided, in teachings, letters and poems, the inspirational wellsprings that gave rise to this magnificent cathedral. The School of Chartres produced scholars who were both respected for their great learning and feared for their "heretical" views. It is well known that the arts, including music, poetry and sculpture, flourished there. The Chartres Masters also conceived of a therapeutic impulse which is not well known today.[2]

The cover of this book was inspired by the brilliant blues and reds that predominate in the stained glass windows at Chartres. Used as part of an early "color therapy" treatment by the Chartres Masters for certain visitors who were sick, the light shining through these windows had a therapeutic effect on some illnesses. Modern research has shown that the color blue relates to the left eye's tendency toward panoramic vision, while the color red relates to the right eye's affinity for close details.[3] By looking at the cover, you can experiment with color therapy for yourself.

The School of Chartres sustained the vision and the impulse for work and learning that motivated generations of architects, engineers, stained glass artists, stone masons, sculptors and carpenters to work together in a spirit of care and commitment, to build this cathedral. The whole town, along with famous craftsmen from all over Europe, sustained the building effort for over two hundred years, despite numerous fires, financial crises, political upheavals, wars and other difficulties. This masterpiece of symmetry and grace stands, not only as a monument to their harmonious persistence, but also as the blossoming flower of a deeply-rooted stream of teaching that fed people's hunger for knowledge and provided work that related them to the sources of meaning.

Chartres stands as an inspiration and a challenge to organizations today. The question it poses is this:

What is the genius behind cathedral building, and how can we use it to change our organizations into places where work,

learning and a healthy life begin to resonate with the creation of something as beautiful, enduring and worthy as a cathedral? [4]

The Green Cathedral

New York City's Episcopal Cathedral of St. John the Divine has been named "The Green Cathedral" for its controversial stance that "Ecology is God's work." According to the Very Reverend James Parks Morton, Dean of the Cathedral, "Ecology and religion bind the cosmos from below and above. Together, they are the heaven and the earth of the understanding we urgently need in this new millennium." [5]

Projects and activities abound at the New York Cathedral to build a spiritual bridge linking past and present, sacred and secular, human beings and the rest of creation. To bring the church closer to its own community, young people from the local Harlem neighborhood are enlisted to be trained by English master craftsmen as stone cutters and carvers to resume construction on the unfinished third of the building. The Feast of St. Francis is celebrated annually with a Blessing of the Animals, an all-day affair in October when an elephant, llama, camel, a python, birds, and thousands of pets come to the altar for blessing. After the service, there is an environmental fair. Other projects include an urban greenhouse prototype to enable city dwellers to grow organic produce on their rooftops, and the ecological restoration of meadows, wetlands, and salt marsh sites in the Hudson River Valley bioregion.

"In today's world, this discovery of the 'new' is coming, not from theologians, but from scientists and artists," says the Cathedral's Dean Morton. [6]

The Corporate Cathedral

Corporate leaders are fascinated with the cathedral idea. It brings hope for harmonizing the complexity of large, far-flung human organizations. As the need for substantive change sweeps into board rooms, offices and shop floors, a search for ongoing, broad-based systems to improve quality, flexibility, initiative, and *esprit de corps* becomes increasingly important. Turning work organizations into cathedrals makes sense.

Corporations such as General Motors and Whirlpool experiment with the cathedral idea by creating extravaganzas with much fanfare and pageantry to reinforce a set of values and beliefs. Others such as AT&T, Du Pont, and Apple Computer are tackling the subject of "contribution" in new ways. They include a new question in their search for a vision: "What is our higher

purpose?"[7] A sense of serving something higher than the "bottom line" is helping create a new *esprit de corps* among employees.

How can we build a cathedral here?

Whenever groups of people gather to work on something that's important to them, the idea of cathedral building is a powerful tool that can be put to use. Here are a few ways to start using this tool:

- Build the four "cathedral themes" into the work you are doing now:
 - Revive learning
 - Restore meaningful work
 - Re-establish genuine healing
 - Re-awaken the arts
- Create vivid mental pictures of past, present and future cathedral building, and let these inner imaginations inspire your own work.
- Seek out relationships that encourage and support free cooperation between work, learning, healing and the arts.

The 21st century cathedral will be a web of relationships strong enough to hold up under crisis, and transparent enough to let the light of new thinking come through. It will be a working-healing-learning community of social artists who are wise enough to produce and distribute the goods and services that are truly needed in the world, and understanding enough to embrace all peoples and cultures the way they want to be embraced.

The four cathedral themes are like seeds that slumber within each of us. When we create the time, space and inclination to activate them, they begin to grow.

FOOTNOTES FOR MASTERY PROCESS #1

1. Christopher Schaefer, "The Highest Art: How We Are All Social Artists (and Social Scientists), *Breakthrough*, Winter/Summer, 1990, Global Education Association, pp. 40-42.
2. Rene Querido, *The Golden Age of Chartres: The Teachings of a Mystery School and the Eternal Feminine*, Edinburgh, Floris Press, 1987, pp. 13-19.
3. Audrey McAllen, *The Extra Lesson*, 1985, p. 14, quotes E. Lehrs, *Man and Matter*, Rudolf Steiner Press, 1985.
4. WBC Symposium Series, "The Cathedral Builder Mentality: An Inspiration for Workplace Learning and Organizational Change," proposal development, 1992.
5. Jon Naar, "The Green Cathedral," *The Amicus Journal*, Winter, 1993, pp. 22-28.
6. Ibid.
7. Jim Channon, "Creating Esprit de Corps," *New Traditions in Business*, pp. 52-65.

CHAPTER 2. THE STEERING COMMITTEE : STRUCTURE AND PROCESS

"The successful firm is the firm that organizes itself as a learning system in which every part is designed to promote and accelerate both individual learning and collective learning -- and to put that learning to productive use."

- Marshall and Tucker, *Thinking for a Living*, 1992

"All in the organization must master the cycle of thinking, doing, evaluating and reflecting. Without [that], there is no valid learning."

- Ray Stata, CEO, Analog Devices, 1989

OVERVIEW

Chapter One gave you an orientation to some of the issues of workplace education in light of recent and ongoing changes. Now it is time to gather some tools that will allow you to respond to those issues and changes. Through the activities in Chapter Two, the steering committee begins to shape itself into a group of independent and creative thinkers capable of carrying out purposeful action together. You will learn processes for developing the capacity to structure and sustain yourselves as a group, make consensus decisions, work with models for problem solving and the design process, create an effective information flow system, and develop a mission statement for implementing an employee-driven workplace learning program. **Mastery Process #2** suggests a different way to take a break from meetings: discover the benefits of "The Three Minute Fresh Air Break."

OBJECTIVES

1. Create a flexible and efficient group structure that lets people try out new roles and functions as they develop new masteries.
2. Develop a representative, consensus-based, dialogue and decision-making process.
3. Agree on steering committee information-flow policies and meeting procedures.
4. Create a steering committee mission statement.
5. Use the Discovery and Intention Learning System to explore new options for personal and group mastery.

ACTION STEPS

ACTION STEP 1. CREATE A FLEXIBLE WORK STRUCTURE

A group is an interplay of dynamic relationships in constant flux and change. To become an effective group, its members usually find they need to participate with each other more or less actively over a period of time to become conscious, or at least intuitively aware, of the human dynamics that are operating between them. The relational learning that takes place through this process may not be without conflict and pain, but if approached in the right spirit, it can yield a group that knows and honors its members' strengths and strivings, a group that can work together to accomplish something significant that truly serves a greater whole.

To create such a group out of this steering committee, it will be helpful to explore together how the group functions and structures itself to accomplish work. The insights of Sandra Seagal and David Horne in their booklet, *Humanity - A Living Technology*, provide a starting point for this exploration:

"All phenomena can be seen as coming into being in three stages. The creation of an organization (or a group) [1*], for example, can be seen as a process which: begins with an idea or initiating purpose; then establishes a dynamic set of relationships among people with the goal of implementing that purpose; which results in a specific style of manifestation. Once the organization is formed, these three components co-exist in a dynamic interplay.

"In looking at a human being, it is possible to equate the initiating purpose with the mind and the will; the dynamics of the relationships with the emotions; and the specific manifestation with the body, which is the mechanism through which the will and the emotions are expressed.

"Because these three stages or components apply universally, they can be regarded as principles. Because of the nature of their expression in human beings, we term these principles the mental, the emotional and the physical."[2]

According to Seagal, the understanding of the functioning of the mental, emotional and physical principles is not a model - a cognitive representation of human functioning. Rather, it is a description of living processes, the real

* All footnotes will be noted in brackets and listed at the end of the chapter.

understanding of which requires active participation. Seagal says the three principles combine in people to form nine basic personality dynamics, five of which predominate. These conclusions are based on her systematic observation and interviews with over 30,000 people from more than 25 different cultural groups.

With active participation, the structure of a group can be understood in terms of the dynamic interplay between these three principles as well.

The Mental Principle is active when you are relating to ideas. It allows you to be a leader, first of all with yourself, so that you follow your own ideas and directions, and then with others who come to respect you.

The Emotional Principle is active when you are relating to personal interchange and the interactions between people, data and experience. It allows you to be an organizer, creatively linking, communicating and relating your own and others' feelings to outer events and changes.

The Physical Principle is active when you are relating to concrete facts, specific tactics, and the actions required to carry a plan into operation. It allows you to be a producer, making and doing things that are useful.

These three principles live in individuals in different combinations. They also live in a group in a dynamic and changing interplay that structures the group according to three corresponding functions. The three basic group functions are:

- to lead
- to organize
- to produce

When these functions are recognized by group members, they can be orchestrated and balanced to create the kind of flexible group structure that allows group members to learn from each other's strengths, experiment with new roles, and accomplish quality work together.

Three Basic Group Functions

The **leader function** is that of the **pathfinder**, tuning in to the new ideas and concepts, seeing the possibilities, initiating the new reality, laying out the new overview and structure, establishing the values, principles and rules, pointing the direction.

The **organizer function** is that of the "social artist," developing the personal interchanges and organizational linkages, building the relationships,

communicating the new ideas, connecting the people, designing the plans that link them all into the new work, assigning the new roles for carrying out plans, formulating, synthesizing and assessing the blueprints for the new initiative.

The **producer** function is that of the **master-craftsman**, putting the plan to work, developing the tactics, performing the new tasks, honing the new skills, making the plans practical, making the actual product, manifesting the idea in the world, packaging, detailing and then utilizing the product, distilling the essentials to make it all work efficiently.

Basic Group Functions

<u>Mental Principle</u>	Leader	=	Pathfinder
<u>Emotional Principle</u>	Organizer	=	Social Artist
<u>Physical Principle</u>	Producer	=	Master Craftsman

By discovering when and how these three principles are active in you and in the other members of the group, you can begin to get a sense for how to adjust to each other and rearrange roles and tasks so that all three principles can express themselves in a balanced way. When a number of group members take responsibility for making sure there is clear direction, sensitive organization, and practical action, the group flourishes and develops a healthy ability to sustain a strong, flexible and resilient structure.

How do you know if a group structure is flexible?

A group structure is becoming more flexible when:

1. More than one person has the opportunity to exercise leadership.
2. Organizing functions such as scheduling, keeping minutes, hosting meetings, recruiting volunteers, and communicating information are passed around to different group members.
3. The producer function of turning out "the goods" is shared equitably by everyone.
4. The group authorizes and encourages each member to function in multiple roles in order to develop themselves, and the group, more fully.

5. Members continually seek out opportunities to improve personal leadership, organizational abilities and production talents, and use them to better serve the group and its mission.
6. Each member takes full responsibility for the success of the whole effort, and reaps full reward when it is accomplished.

To familiarize yourselves with the three living processes that combine to structure a group through an interplay of roles and functions, select a partner and talk over the following themes together:

FLEXIBLE GROUP FUNCTIONS

Describe a time when you played the role of a leader or pathfinder. What was your guiding idea? How did it work out?

Describe a time when you played the role of an organizer or social artist. How did you work with people to get them to communicate, collaborate or create something together? How did it work out?

Describe a time when you played the role of a producer or master craftsman. What were you working to operationalize or produce? How did it work out?

Which role comes most naturally to you?

Which other role would you like to "try on"? Why?

Two Group Rituals

1. The Hat Switching Ritual

Encourage group members to "try on different hats" and take on less familiar roles. For a fun exercise, create a leader hat, an organizer hat, and a producer hat. When people volunteer to facilitate part of a meeting, take notes, or follow up on a piece of work, offer them the appropriate hat. Hats can serve as reminders as to which role each person is taking on. Periodically, there should be a "switching of the hats" to give others an opportunity to experience new roles and functions.

2. The Talking Stick Ritual

This ritual can be used with the next section on building consensus. One reason a lot of groups don't work at their maximum potential is because the quieter people don't get to be heard. The Talking Stick Ritual gives everyone a chance to speak and be heard on an issue. It also allows all points of view to have equal consideration. A special object is created and designated as the Talking Stick. It can be a piece of art created by several members with group symbols attached. Periodically, the Talking Stick is brought out and passed around the group circle (with no tables or other furniture separating people). A pertinent issue is selected. Whoever holds the Talking Stick is the only one allowed to talk. That person speaks their views on the selected issue and then passes the Stick to the next person. Everyone has their say. The stick goes around several times until everyone is "talked out." The result is often a clear consensus on the issues under consideration. Then the action to take becomes obvious. Or, at the next meeting, after everyone has had a chance to "sleep on it," a clearer direction emerges.

ACTION STEP 2 DEVELOP CONSENSUS DECISION-MAKING AND GROUP PROCESS SKILLS

To give you a foundation in the group skills you will need in order to work together effectively, a group process facilitator will lead the steering group through a series of activities to learn and practice the following group process skills:

- A. CONSENSUS DECISION MAKING
- B. USE OF A FLIPCHART
- C. BRAINSTORMING
- D. GROUP PROBLEM SOLVING
- E. THE DESIGN PROCESS

The Columbus Area Labor-Management Committee has provided the materials for this section from the Training Manual developed by the U.S. Department of Labor, Bureau of Labor-Management Relations and Cooperative Programs. Local Labor-Management Committees are an excellent source for experienced group process facilitators.

SECTION A. Consensus Decision Making

Definition of Consensus

A group reaches consensus when:

1. All members agree upon a single alternative, and
2. Each group member can honestly say:
 - I believe that you understand my point of view and that I understand yours.
 - Whether or not I prefer this decision, I support it because:
 - It was reached fairly and openly, and
 - It is the best solution for us at this time.

Guidelines on Reaching Consensus

1. Listen: Pay attention to others.
2. Silence does not mean consensus.
3. Encourage participation.
4. Share information.
5. Don't agree too quickly.
6. Don't vote. Voting creates winners and losers.
7. Treat differences as a strength.
8. Create a solution that can be supported.
9. Avoid arguing blindly for your own views.
10. Seek a win-win solution.

SECTION B. Using a Flipchart

Advantages of a Flipchart

A flipchart is an indispensable piece of equipment for a truly interactive group process. Better than a blackboard, easier on your eyes than a video, slide or computer screen, the lowly flipchart is a powerful tool that you can't afford to be without. Here's why:

1. It serves to focus the group's attention.
2. It provides a record of the discussion.
3. It helps the group listen to everyone and validates people's ideas equally.
4. It separates the ideas from the person who gave them so ideas can be evaluated objectively.
5. It helps people organize their thoughts. (Colored pens can be used to code and cluster ideas.)
6. It provides access to information from earlier discussions.
7. It prevents good ideas from getting lost. (Flipchart sheets can be taped to walls, moved to other rooms, and typed into summaries for future meetings.)

Guidelines for Using a Flipchart

To use a flipchart effectively, you can appoint one person to be facilitator and a second person to be a recorder. Together, they work as a team to facilitate the discussion process. From an objective and transparent "observer" position, they act like a lens to focus the group's creative energy toward the group goal. (If the facilitator or recorder want to "put their two cents' worth in," it helps if they first say they are "switching hats," or speaking as a group member, before making their comment.)

Besides a free-standing flipchart, you will also need felt-tip pens in several colors and some masking tape for displaying finished sheets on the wall.

Here's how the process works:

- A. Work with the group to set a goal for the discussion.
- B. Keep the group focused on the goal.
- C. Listen with alertness to each person.
- D. Make sure that all who want to speak may do so.
- E. Record each comment, highlighting its key idea.
- F. Write or print clearly so all can read it.
- G. Check back with the speaker to see if the flipchart accurately reflects his/her meaning.
- H. Keep pace with the discussion and help the group stay in rhythm with the recorder.
- I. Use new flipchart sheets to synthesize or consolidate ideas and information.
- J. Number flipchart sheets for easy reference later.
- K. Tape finished sheets on the walls for easy reference now.
- L. Keep checking with the group to see if you're on track.
- M. At the end, summarize what the group has accomplished and identify next steps.

SECTION C. Brainstorming

Brainstorming is one of the basic tools of group work. It is used to generate fresh ideas.

There are many different ways to think. We remember, reflect, analyze, criticize, discriminate, make connections and synthesize ideas. We imagine, rehearse and have conversations, all in our minds. Brainstorming is one particular way to think that works well when you have a group of people to think with. To "storm the brain" with fresh ideas, we temporarily shut down certain ways of thinking in order to encourage other modes of thought.

Use the following exercise to help you shift your thinking for brainstorming.

Word Association Experiment

Write down the first word that comes to mind for each of the following:

- a color
- a hero
- a fruit
- a city
- a flower

Take a show of hands to discover how many people chose "red" for color, "apple" for fruit, and "rose" for flower. The Red-Apple-Rose Syndrome is the tendency for these three choices to appear, predictably, a disproportionate number of times. Why do you think so many people choose "red," "apple," and "rose" when there are so many other colors, fruits and flowers to choose from?

We all have a tendency to grab on to the familiar, the accustomed, the "tried and true."

Brainstorming, in contrast to this word association exercise, is

"a technique that helps a group to 'break set,' that is, to go beyond familiar boundaries and associations to develop new and creative ideas."

Brainstorming is effective to the extent that the group follows the following guidelines for brainstorming.

Guidelines for Brainstorming

1. Don't critique ideas.

Don't take time to evaluate ideas; it interrupts the flow of ideas. Evaluating ideas is another, later step in the process.

2. Use freewheeling imagination.

Let your mind work freely. Don't prevent ideas from emerging by rigidly adhering to logical thinking. Don't feel bound by budget, time, staff, or other resource constraints. Share mental images, synonyms, plays-on-words, free associations, farfetched ideas. Go for the blue sky.

3. Build on others' ideas.

Combine, expand, hitchhike, piggyback.

4. Aim for quantity.

The more ideas you can bring out, the better. Don't worry about duplicates. You are not aiming for quality at this point, only quantity.

5. Record each idea.

Record each idea on flipchart paper exactly as it is presented. Try to keep it brief but faithful to the wording of the presenter.

Practice Exercise: As a group, brainstorm all the birds you can think of, using the guidelines for brainstorming listed above.

Uses of Brainstorming

In the steering committee work, brainstorming can be used at several stages of the program design and implementation process:

- To produce a list of needs or possibilities to focus on,
- To identify possible causes of a problem, and
- To generate as many potential solutions as possible.

Brainstorming can produce a lot of positive energy in a group as you begin to see new possibilities and better ways to do things. As you begin to evaluate the ideas generated and identify specific directions, there are two approaches you could take for implementing change:

1. Problem-solving model
2. Design process model

The first is to use a traditional problem-solving model as outlined in Section D below. This will be useful for some of the more concrete issues you will be

dealing with, such as scheduling learning group sessions, recruiting new participants, and dealing with confidentiality concerns.

The second approach is a design process model, based on generative learning and on how organic growth happens. This approach is outlined in Section E. This design process model will be more useful for nurturing your best ideas so they can become established as new norms in organizational practice.

SECTION D. A Group Problem-solving Model for Change

If a hammer is the only tool you know how to use, every problem will be viewed as a nail.

- American proverb

A problem-solving model is a **conceptual framework** for addressing problems, not a formula for solving them.

People are the actual problem solvers. But groups of people usually need an agreed-upon framework to keep them focused and on task. A problem-solving model helps to:

- Air everyone's ideas and concerns
- Look beyond symptoms to causes, values and common visions
- Explore a full range of approaches, selecting a technically sound approach acceptable to all concerned
- Anticipate adverse impacts
- Follow through on steps needed to implement the approach
- Work together productively
- Solve problems

Six Step Problem Solving Model

1. Identify the problem.

Review the current situation, fitting information together like pieces of a puzzle. Identify and discuss symptoms and scope of the problem, determine what "hurts," to what degree the symptoms are shared, and the urgency of relieving the symptoms. **Possible tools:** brainstorming, interviewing and questionnaires to gather information. **Things to**

notice: You'll probably raise, review and discard various **statements of the problem** as you sort out what are merely symptoms and look behind them to start defining the problem in terms of its deeper causes.

2. **Diagnose the problem.**

Gather information about the nature of the problem and determine its root causes. The deeper causes will be reflected in your re-definition of the problem. **Possible tools:** cause and effect analysis, causal mapping. **Things to notice:** You continue to re-define the problem based on new information. You gradually shift from addressing random symptoms to addressing the roots of a documented problem.

3. **Develop solutions.**

Explore a full range of viable solutions before doing the "knee jerk" reaction of jumping too soon toward a particular solution. **Generate** as many potential solutions as possible. **Relate** each to the causes of the problem. **Merge** similar or related solutions. Narrow the field, reduce redundancy, and eliminate any possibilities that don't address the actual causes you identified. **Possible tools:** brainstorming for solutions, force field analysis for preliminary screening.

4. **Select a solution.**

Evaluate each potential solution for strengths and weaknesses. Two **criteria** for the most effective solution: (1) has the **technical quality** necessary to resolve the problem; (2) is **acceptable** to those who will be using it.

To determine **technical quality**, ask:

- Can it be implemented in a reasonable time?
- Can it be done within cost limits?
- Will it work reliably?
- Will it use staff and equipment efficiently?
- Is it flexible enough to **adapt** to changing circumstances?

To determine **acceptability**, ask:

- Do the implementers support the solution, perceiving it to be worth their time and energy?
- Are the **risks** manageable?
- Will the solution benefit the **persons** affected by the problem?
- Will it benefit the **organization**?

5. **Implement the solution.**

Putting a solution into action can be as challenging as deciding on one. **Action planning** answers the following questions:

- What must be done?
- Who will do it?
- When will it be started? When will key milestones be completed?
- Where will the necessary actions take place?
- Why are these actions a solution?

6. **Evaluate the outcome.**

Monitor the project to ensure that milestones are met, costs contained and work completed. **Plan effective feedback processes** to detect the need for midcourse corrections and to make sure the problem gets solved without creating any new problems. **Collect data. Report on what has been accomplished** to keep you credible with constituents. **Reflect** on your own processes and results to keep yourselves effective as a group.

When you are solving problems, keep this six-step model in mind. You can use it to help the group discussion stay on target. Any member can remind the group about which stage you are working in so you don't "jump the gun" before you are ready. The model can also serve to remind you of the importance of follow-through. The implementation and evaluation steps are what make your solution a reality.

SECTION E. A Design Process Model for Nurturing Change

"People don't resist change. They resist being changed."

- Peter Senge, The Fifth Discipline, 1990

A learning human being is not a problem to be solved, but a mystery that unfolds according to an internal timing, purpose and integrity.

To generate energy for change, especially a learning-related change, a problem-solving mentality is not always appropriate. The generative learning model is based on how change happens organically in the growth of an organism, whether it be the development of an embryo into a baby or the birth of a star in the universe. Like the development of embryos and stars, human learning is a growth process.

Learning is the awakening of new capacities. Something new is generated ("born") within the learner, just as the ability to hear and to see are generated in the infant as the respective organs form and awaken.

Whereas the problem-solving model is appropriate for dealing with the more concrete aspects of an organization's existing forms, the generative learning model is appropriate for awakening new capacities and creating new forms. It is a design model, rather than a fire-fighting model. Its purpose is not to fix a crisis, but to open up new possibilities.

To generate new forms, organisms go through stages of development that can be seen as a type of "call and response." The design process consists in being able to recognize the "call" of the new idea or initiative when it comes, and to support it with the appropriate "response" to nurture it into its next phase of growth. Here are the stages of development, shown in their complementary "call and response" forms:

CALL:

RESPONSE:

NEW IDEA OR INITIATIVE

NURTURE AND SUPPORT

1. **Activate Seed Force**
(Plant an idea for change)
2. **Gestate in a Protected Environment**
(Imagine the idea fully; protect it from premature analysis until it grows its own form and structure)
3. **Emergence as a New Form**
(The idea takes on a life and a form of its own)
4. **Nurture the New Form**
(Give the new form warmth, space, food, light, air, water, stimulation and encouragement)

5. Awaken to New Capacities

(The new idea-form discovers
new things it can be and do)

6. Develop New Capacities

(The new activities are supported,
strengthened and channeled into
opportunities for usefulness and service)

7. Fully Express New Capacities

(The new idea-form comes into
its own power and effectiveness)

8. Condense Fullness into New Seed

(The idea-form is challenged to "work itself
out of a job" by packaging its essential nature
into a form that can be used by another)

These stages occur in pairs of complementary activities that carry out a kind of call-and-response dialogue with each other. Individual Initiative is required to start the process. But before that can happen, the "nesting space" must be prepared. If there is to be appropriate response to the initiative, certain things must already be in place. The nesting space is a kind of womb-space, a matrix. A matrix is a "situation or surrounding substance within which something originates, develops, or is contained." [3] The supportive, matrix aspects of our organizational change models -- those activities on the right side of the diagram above -- need to be given more attention and honor. The human matrixes that nurture and encourage organizational change initiatives need researched, strengthened and better understood. Then we can balance, sustain and enjoy change more of the time, for we will have learned to prepare a proper place for it.

Understanding this process allows the vitality of life to stream through change in a continuous flow, without being thwarted or aborted by ignorance, misdirection or confusion. When the signals of each new growth phase are recognized, preparations for the next phase can begin. The sequence and timing of the changes become driven by inherent growth patterns rather than by unrelated, artificial requirements. Just as we become fascinated watching seeds sprout into leaf forms and stem-tips develop buds that eventually blossom, so we can watch with awe as a group of human beings goes through its learning process to develop new forms for thinking, creating and working together. And, we can support each other appropriately in that ongoing effort. This design process works with the natural flow of things to bring

about change. In the long run, it is very sustainable because it helps people move forward in the directions they really want to go.

Summary

The Problem Solving Model can be useful when you are trying to fix something or find a remedy for something that has gone wrong in an existing routine or process. The Problem Solving Model asks for clear, logical thinking capacities.

The Design Process Model can be useful when you are committed to creating something new. It moves beyond the "quick fix" mentality that sometimes accompanies problem-solving, to the exploration of new mental models, new ways of seeing old situations so that whole new structures and processes can be designed. The Design Process Model calls on artistic as well as intellectual capacities. It asks for mobility of thinking.

Both models can be helpful tools as you design and implement your workplace learning program.

ACTION STEP 3. ESTABLISH AN INFORMATION FLOW POLICY AND PROCEDURE

When Xerox Corporation was undergoing major restructuring under CEO David Kearns, there were fundamental changes made in (1) the way problems got solved and (2) how meetings were run, "two functions that turn out to be closely related." According to Ray Marshall and Marc Tucker in *THINKING FOR A LIVING*:

Xerox has a standardized model of the generic problem-solving process for use throughout the corporation. One must, for example, be clear about what the facts are before a problem is analyzed and a solution is presented. There is a standardized meeting protocol. Anyone holding a meeting is expected, for example, to state its purposes clearly, lay out an agenda with times allocated for each major agenda element, and state what the outcomes of the meeting are expected to be. The convener is expected to check with the participants for their agreement on the agenda, and to appoint a facilitator to keep the meeting moving, as well as a recorder to make sure that it is clear what has been concluded and who is to do what when the meeting ends. (p. 96)

As you are creating an information flow policy for the steering committee, the experience of the people at Xerox might give you some useful ideas.

In the next chapter, the steering committee will be organizing and coordinating a needs assessment process that will ask for the participation of a number of volunteers. To prepare for this task, it will be helpful, at this point, to discuss and establish a communication policy that will keep information flowing to and from all the people who need to be brought into the process.

Here are the partners who will have a stake in the learning program's needs assessment process:

- THE STEERING COMMITTEE (and the groups it represents)
- EMPLOYEE, STAFF AND MANAGER VOLUNTEERS
- THE UNION (where applicable)
- THE TRAINING DEPARTMENT
- THE FACILITATOR
- OUTSIDE CONSULTANTS

These stakeholders need to communicate with each other. The steering committee determines how that communication will happen. The more openly information can flow *before* all the decisions are made, the more all the stakeholders will be able to see a role for themselves and participate actively in the process. If you create high standards for your communication flow policies at the outset, you invite a high quality of personal investment from the people who volunteer to participate in the learning program that you design.

The information-flow policy you establish needs to address:

- Who will receive steering committee meeting minutes?
- When and how will employees and other stakeholder groups be informed of steering committee plans?
- What will employees be told? (What will they not be told?)
- Who will receive needs assessment results? (At the very least, all needs assessment participants should receive the summaries of their portion of the assessment.)
- How will marketing and P.R. announcements align with the committee's substantive information flow? (Do they tell the same story to all the stakeholders?)
- How will you communicate the results of the needs assessment to all employees?

After discussing these questions, compile your answers into an information flow policy. This policy should show how all the partner groups link, first of all, into the needs assessment process, and then, into the full workplace learning program. You might want to express it as a flow chart diagram.

OUR INFORMATION FLOW POLICY:

Now that you have stated your policy, you will need to set up a way to practice it with consistency throughout your work together. If individual committee members take responsibility for informing their respective stakeholder groups, it still rests with the committee as a whole to keep the communication flowing to and from all the partner groups appropriately.

In preparation for the needs assessment planning process, identify how you will make sure each of the learning program stakeholders stays informed throughout. For each stakeholder listed in the space below, show how they will be linked into your communication flow loop.

Procedure for Information Flow

Identify what gets communicated, how often, who does it, and how the communication will happen.

- Among steering committee members
- With the coordinating facilitator
- With outside service providers
- With the training department
- With the union (if applicable)
- With employee, staff and manager volunteers
- Others?

Meeting Procedures

To be an effective task force, the steering committee needs to make clear its expectations regarding meeting procedures. Discuss and answer the following questions to determine a meeting protocol that works for everybody.

MEETING PROCEDURES

How often will the steering committee meet?

When will meetings occur?

How long shall meetings last?

Where will meetings occur?

What should be included in each meeting agenda?

Who sets the agenda?

How shall agenda items from other members be included?

What is expected of committee members between meetings?

What if someone cannot attend a meeting?

What if someone can no longer serve on the committee?

What are your criteria for a successful meeting?

What other questions about meeting procedures need answers?

Communication Self-Sabotage

You can dissolve a lot of communication problems before they happen by noticing your own tendencies and providing alternative routes ahead of time. Discuss the following questions with the steering committee and write the group's best solutions here.

PREVENTING COMMUNICATION SELF-SABOTAGE

What are the blocks, confusions and gaps that prevent good organizational communication within and between the groups you have known?

How might people sabotage their own communication feedback loops?

When you've been in groups where communication flowed well, what made that happen?

What strategies would prevent group self-sabotage and facilitate good communication flow in your present endeavor?

How can you best implement these strategies?

ACTION STEP 4.

CREATE A STEERING COMMITTEE MISSION STATEMENT

This steering committee has been gathered on the basis of certain assumptions that have been made about your interest in workplace learning and/or your desire for involvement in new projects such as this one. However, until you agree on why you are here and what you want to accomplish, you will not be able to fully tap the potential of this group to create a quality service for this organization.

A MISSION STATEMENT identifies the group's overall purpose, states the nature of the work you have gathered to do, and clarifies the results you hope to accomplish through your common efforts.

To create a mission statement for yourselves, start by discussing the following points together. Then write a summary of the group's position for each point.

The group's purpose

The relationship to the larger organizational mission

The service you are offering

The context that creates a need for this service

The "customers" for your service

The signals that will tell you quality service is being delivered

The visions, values and ethics that motivate you to do this

After discussing the above topics together as a steering committee, find the most important common themes and write your group mission statement:

STEERING COMMITTEE MISSION STATEMENT

Let this mission guide you as you carry out the rest of your work together. It can always serve as a starting point and a common reference point in the work that follows. You will be working with this mission statement in the next chapters as you develop specific goals for the various components of the workplace learning program.

ACTION STEP 5. USE THE DISCOVERY AND INTENTION LEARNING SYSTEM TO EXPLORE NEW OPTIONS FOR PERSONAL AND GROUP MASTERY

The following two-part learning system gives you a useful tool for becoming more aware of your own learning process. It's a simple but powerful way to direct your ordinary, everyday learning toward the personal goals you want to achieve. It's also a good way to get in touch with what you are learning in this training program so you can make use of it in a way that's suitable for you.

The Discovery and Intention System

The Discovery and Intention System is a simple feedback tool that will let you explore your learning process and discover the masteries that are most meaningful to you. In his book, *Becoming a Master Student*, David Ellis relates the Discovery and Intention System to keeping an airplane on course. There is a feedback loop between the pilot's observations and the resultant course corrections he makes in order for the airplane to reach its destination. This is the same kind of feedback loop you can create with the Discovery and Intention System. Airplanes are seldom exactly on course. Their path looks like a zigzag, with human or automatic pilots constantly observing and correcting, checking and adjusting the flight pattern. Just so, DISCOVERY STATEMENTS are a way to observe what's happening in your learning efforts, and INTENTION STATEMENTS are a way to adjust your direction in order to reach your goal.

Through DISCOVERY STATEMENTS, you can observe "where you are" and register what's happening now. They are a record of what you learn about yourself as a learner. DISCOVERY STATEMENTS are declarations of what you want, pictures of your feelings, and descriptions of your attitudes, thoughts and behaviors.

Through INTENTION STATEMENTS, you can alter your course. They are statements of your commitment to do a specific thing, to take a certain action. An intention arises out of your choice to direct your energy toward a particular goal. The purpose of an INTENTION STATEMENT is NOT to get you pumped up and excited to go out there and try harder. INTENTION STATEMENTS are not about trying harder. The purpose of an INTENTION STATEMENT is to set your course, and to reset your course, again and again, as often as necessary.

DISCOVERY STATEMENT GUIDELINES

The simplest way to write a discovery statement is to focus attention on some aspect of your learning effort and say,

I discovered that....

We make little discoveries about ourselves all the time, but we often don't see how that information can be useful as we chart our personal directions. Writing discovery statements is a way to focus your energy. Writing down discovery statements helps you become aware of the energy you're investing in certain efforts.

Here are seven Discovery Statement Guidelines:

1. Discover what you want.
2. Record the specifics.
3. Notice your inner voices.
4. Notice feelings and sensations.
5. Use discomfort as a signal.
6. Suspend self-judgment.
7. Tell the truth.

INTENTION STATEMENT GUIDELINES

The simplest way to write an intention statement is to look at one of your discovery statements, decide what action it suggests to you, and then finish the sentence:

I intend to...

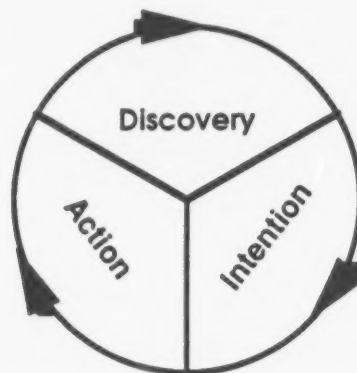
We make intention statements all the time, but we often don't recognize how to use them to correct our course. An intention statement focuses on a positive action you can do that doesn't depend on anyone else but you to accomplish. When you write intention statements for your discoveries, you come from your place of personal strength and you focus your energies in a single direction. In this way, you direct your energy so it stays on course.

Here are seven Intention Statement Guidelines:

1. Make your intentions positive.
2. Make intentions small and reasonable.
3. Use observable criteria for success.
4. Set deadlines.
5. Make intentions dependent on you alone.
6. Consider how you might sabotage your intentions.

7. Identify your rewards.

Intention statements grow out of your discoveries. Discoveries emerge from putting an intention into action. They allow you to discover and rechart your course as many times as is necessary in order to reach your destination. They make a full circle, like this:



Here is an example of how discovery and intention statements work together to focus your action:

DISCOVERY: I discovered that I learn best when I have other people to talk to about what I am learning.

INTENTION: I intend to learn in groups where there's a lot of dialogue and discussion, or work in teams where I can talk to people about the new work processes I am learning.

ACTION: I have asked two other people to work with me to figure out a new software program we will be using for a project, so we can talk each other through any trouble spots. (Another discovery can come from this action.)

Procedure

You can write Discovery and Intention statements whenever you think of it. You can also use them to help you get your bearings and chart your course as the steering committee completes each segment of its work together. They are a great way to begin and end your work sessions. Use them often, and share them with each other for additional insights!

As you work on your intentions, remember that no one always follows through on all their intentions. That's not the point. The point is to notice what happens, make a new discovery statement, and re-chart your course, as

many times as necessary to get to your goal. Intention statements help you focus your efforts, try new approaches, and establish effective new routines for yourself. Be patient with yourself, but keep at it. This is how you can become a master learner.

Write three sets of Discovery and Intention Statements here. You can focus on your experiences with the Orientation Workshop (Chapter 1), the Steering Committee Group Processes (Chapter 2), or any other recent experience that comes to mind.

A. *I discovered that...*

Based on that discovery, I intend to...

B. *I discovered that...*

Based on that discovery, I intend to...

C. *I discovered that...*

Based on that discovery, I intend to...

CONCLUSION

Through the activities in Chapter Two, you have had the opportunity to establish the group process and structure of your steering committee. The group process tools introduced in this chapter are to be used throughout the rest of your work together, for it is the quality of your group interactions and the soundness of the group's decision-making process that will determine the success of the learning program you create together.

In the next chapter, we will focus on assessing the learning needs of a sampling of individuals and groups who work in your organization. The

steering committee has the responsibility of organizing and coordinating a variety of needs assessment activities that involve both volunteer participants from within the organization, and outside experts who will serve as facilitators and observer-consultants. The coordination of the needs assessment gives the steering committee an opportunity to test your group effectiveness as you put into practice the lessons you have learned in Chapter Two.

FOOTNOTES FOR CHAPTER TWO

1. Parentheses added.
2. Sandra Seagal, David Horne, *Humanity -- A Living Technology*, Human Dynamics, International, 1987, p. 4.
3. American Heritage Dictionary, 1970.

MASTERY PROCESS #2 THE THREE MINUTE FRESH AIR BREAK

The umpteenth meeting is dragging on longer than it was supposed to. You feel drained. It's time for a break. And the newest break-through alternative to the coffee-donut-and-cigarette break is the

CLEAR VIEW, CLEAN WATER, FRESH AIR BREAK!

Here's how it works:

As soon as you can, get out of the room, put on your "I have important business to attend to" look, and go on your private quest for

- Three lung-fulls of the freshest air you can find
- Three sips of the cleanest water you can find
- Three eye-fulls of the clearest panoramic view you can find

Be surreptitious -- you don't want too many people to know about your quest. The view could get cluttered, the water could run out, or the air could get filled with smoke and exhaust fumes. But when you find what you're looking for, drink it in luxuriously, like a gourmet discovering the finest wine ever tasted, or a master flower arranger smelling the most exotic new floral bouquet. Go for the feeling, "Now THIS is living!"

FRESH AIR

When you find the freshest air around, breathe in your three lung fulls slowly. Enjoy the feel and smell of the air. Take it all the way down to your toes and up into your hair before breathing it slowly out. Imagine how this air is different from the thin air at the top of a high mountain. Feel how "thick" your air is by comparison -- like milk almost. Imagine breathing the air in a moist, sub-tropical climate -- how much heavier it would be going into your lungs, compared with the air you're breathing now. How would you describe the specific quality of the air you're breathing now? What makes it enjoyable to breathe?

CLEAN WATER

When you find the cleanest water around, sip it slowly. This is *Aqua Vita!* -- the Water of Life! Feel the connection between the fact that both your body and the body of the Earth consists of 70% water. And you are replenishing your 70% from her 70%. Say thanks! Notice the sound of the water as it flows. Remember a time you stood by a stream, a river, a lake or an ocean and listened to the water. Re-awaken the feelings of being refreshed or

renewed. As you sip your water, nourish those awakened feelings of being re-energized by flowing water.

CLEAR VIEW

When you find the clearest panoramic view around, stop and enjoy! Imagine painting it. How would you begin? How big a canvas would you use? What colors of paint would you mix to get just the right hues? Then find three new things about your panoramic view that you never noticed before. Remember them well enough to tell to your friends or family later. Capture the view on your inner image screen so you can take it with you.

Recognize the contrast between your experience of the meeting and your discovery of the objects of your quest.

THE MEETING

If you exerted intense mental effort in the meeting, you taxed your nerve-sense system, centered in your brain and spinal cord. Even though you may feel mentally invigorated by what went on, you could look pale because the effort took its toll on your physical and emotional energies. If you attended the meeting in body only and your own mind was elsewhere, you still taxed your energies by splitting them apart and creating a situation where you were unable to act of your own accord. So you come away from the meeting needing to replenish and rebalance some of your energies.

THE THREE MINUTE BREAK

By walking around looking for three things you want, you activate your physical and emotional energies. These, in turn, refresh your mental energy. The nourishment you get from the conscious intake of fresh air, good water and artistic interaction with natural images can equal and surpass the quick spurts of energy you get from caffeine, sugar, nicotine -- and electronic media -- especially when you're interested in the long-term sustainment of clear thinking. The three-minute break offers you fresh air and liquid for your body, some "inner dialogue" for your soul, and a bit of inspiration for your spirit.

What more could you ask for? Have a great break!

CHAPTER 3. IMPLEMENT A NEEDS ASSESSMENT

"Without a global revolution in the sphere of human consciousness a more humane society will not emerge."

- Vaclav Havel
poet-president of Czechoslovakia
before a joint session of the U.S.
Congress, 1990

*"Whatever you can do, or dream you can, begin it.
Boldness has genius, power and magic in it."*

- Goethe (1749-1832)

THE NEEDS ASSESSMENT

- I. INFORMAL DISCUSSIONS AND INTERVIEWS
WITH PEERS (BY STEERING COMMITTEE)
- II. ASSESSMENT OF INTERACTIVE SKILLS
(BY OUTSIDE FACILITATORS)
 - A. FOCUS GROUPS
 - B. SUPERVISOR AND MANAGER INTERVIEWS
- III. ASSESSMENT OF CORE COMPETENCIES
(BY OUTSIDE FACILITATORS)
 - A. SAMPLE WORK DOCUMENTS
 - B. EXEMPLARY EMPLOYEE PRACTICE
- IV. ASSESSMENT OF LIFE SKILL FOUNDATIONS
THROUGH EMPLOYEE INTERVIEWS
(BY OUTSIDE FACILITATORS)

OVERVIEW

In Chapter Two, you learned processes for becoming an effective group. Through the activities in Chapter Three, you will be able to apply those processes to your first group project. The steering committee's task in this chapter is to organize a series of needs assessment activities and coordinate volunteer participants as they work with outside facilitators in focus groups

and other assessment activities. You will also learn how to conduct your own peer interviews as part of the needs assessment. The assessment activities will be collected into an Educational Profile of the organization which will be presented to you by the coordinating facilitator. Through this report, you will have the information you need to recommend learning components for the first cycle of Learning Initiative Team activities. **Mastery Process #3** introduces a process to help you re-energize your dialogues so that you find yourselves saying, "We've Got to Start Meeting Like This!"

A needs assessment is an up-front evaluation that determines the starting point and sets the tone for the learning that will follow. The needs assessment identifies (1) the skills required by present work standards, (2) the learning capacities and motivations of the current workforce, and (3) the future skills development needed for work in this organization.

The needs assessment is the first step of the learning program. It awakens people to the specific learning requirements of the workplace and clarifies participants' present capacities to learn. The needs assessment is essential, setting the direction, sounding the tone, and providing the first "taste" of how the rest of the program will unfold. It is, in fact, a way to pilot the entire learning program in miniature, for it contains most of the same elements and asks for many of the same decisions required by the full learning program. The more upfront interest and involvement you can get for the needs assessment, the easier it will be to generate participation and support when it's time for the Learning Initiative Teams to form.

Any assessment of learning needs must first have a set of standards that clearly pictures what is meant by "mastery." These standards of mastery for your workplace learning activities will depend on the specific mission, goals and requirements of your workplace. In addition to location- and industry-specific standards for excellence, the U.S. Department of Labor has developed *national* standards for workplace learning. These standards, in addition to those specific to your workplace, foster high quality, high performance, and high wages—in *any* work setting. These new standards for workplace learning encourage the upskilling of the U.S. workforce, so that more Americans can take their place as full participants in the vigorous new global economy that is awakening.

Two U.S. Department of Labor studies provide the underlying standards for the needs assessment process suggested here. "Workplace Basics: The Skills Employers Want" (1988), written with the American Society for Training and Development (ASTD), recommended that all employees develop proficiency in seven skill areas now considered "basic" for successful job functioning. (See ASTD insert.) The second set of studies, known as the SCANS Report, for the Secretary's Commission on Achieving Necessary Skills (1991),

recommended that workplace education efforts focus on five competencies and three foundations as standard "know-how" for successful job performance. (See SCANS insert.) The needs assessment that follows uses the recommendations of these two reports as a starting point.

A summary of the recommended needs assessment process appears at the end of this chapter, on pages 102 - 104.

OBJECTIVES

Through the processes outlined in this chapter, the steering committee will be able to:

1. Implement the needs assessment in a manner that enhances the worklife of this organization.
2. Align skills to be assessed with organizational and steering committee mission and goals.
3. Conduct informal, introductory interviews and discussions with peers, using questions from sample lists provided.
4. Schedule the various activities of the needs assessment and make necessary arrangements for such things as focus group sessions, interviews, and the collection of work documents.
5. Orient outside consultants (who will be facilitating Parts Two, Three and Four of the needs assessment) to the organization's mission and the steering committee's process.
6. Monitor all needs assessment activities.
7. Review and discuss the Educational Profile that summarizes the needs assessment results (prepared by facilitator).
8. Disseminate summary of results (Educational Profile) to all needs assessment volunteers.
9. Let the educational profile from the needs assessment guide the committee as it recommends learning components for the first cycle of Learning Initiative Teams.

ACTION STEPS

ACTION STEP 1. STUDY THE CONTENT OF THE NEEDS ASSESSMENT COMPONENTS

The following activities will help acquaint you with the major parts of the needs assessment. These parts are the "seeds" that transform themselves into the skill areas and learning topics of the learning program.

1. PRIORITY LEARNING TOPICS

Review the SCANS and ASTD skill areas described on pages 42 - 43. List the learning topics you think are most important to include in a workplace learning program for this organization. Prioritize your list, starting with the most essential learning needed.

2. RECOGNIZING SKILLS IN USE

Get together with another steering committee member and come up with five or six examples of specific skills you can identify as you watch yourselves and others working in this organization. Describe the skills you saw and the context in which they were being practiced.

3. MASTERY: EXEMPLARY EMPLOYEE PRACTICE

Think of some exemplary employees you know. These are the people who can be depended upon to do their jobs well. What do they do that makes them stand out as an example of job mastery? Based on the above skill lists, what particular masteries can you recognize in the way they do their daily work? List three to five observations and discuss them.

4. EXPERIENTIAL LEARNING: THE NEEDS ASSESSMENT

Participate in a mini-needs assessment conducted for the steering committee by the facilitator and training department to gain first-hand experience in the activities and processes being planned.

Based on your experience of this mini-needs assessment, what three or four recommendations can you make to assure an effective needs assessment implementation?

ACTION STEP 2. IDENTIFY THE COLLABORATING PARTNERS IN THE NEEDS ASSESSMENT PROCESS

The Needs Assessment is a collaborative effort between the following partners:

- THE STEERING COMMITTEE
- THE FACILITATOR
- OUTSIDE SERVICE PROVIDERS
- THE TRAINING DEPARTMENT
- THE UNION (WHERE APPLICABLE)
- EMPLOYEE, STAFF AND MANAGER VOLUNTEERS

The roles of each partner are as follows:

STEERING COMMITTEE

1. Interview peers (Part I)
2. Schedule, organize, and enlist volunteers for Parts II through IV of the Needs Assessment (See objectives for full view)
3. Collect sample work documents for competency analysis (Part III)

FACILITATOR

1. Orient steering committee
2. Enlist outside consultants for assessment of interactive skills and core competencies (Parts II and III)
3. Coordinate development of the Educational Profile from needs assessment data

SERVICE PROVIDERS (from outside)

1. Develop questions and facilitate focus groups
2. Interview supervisors and managers
3. Coordinate collection and analysis of work documents for required literacy competencies
4. Conduct exemplary employee walkabouts to identify core competencies in use
5. Interview employees for assessment of life skill foundations (Part IV)
6. Compile data components for Educational Profile

**TRAINING
DEPARTMENT**

1. Provide support services for needs assessment activities
2. Coordinate all the in-house partners involved in the needs assessment

**THE UNION
(where applicable)**

1. Clarify employee-management responsibilities in regards to activities, policies and procedures being planned
2. Inform employees of rights, opportunities and underlying implications of workplace learning plans

**EMPLOYEE, STAFF
& MANAGER
VOLUNTEERS**

1. Participate in peer interviews conducted by steering committee
2. Participate in focus groups
3. Participate as supervisors and managers in focus group follow-up interviews
4. Participate as exemplary employees in walkabouts to identify competencies
5. Participate in Part IV interviews
6. Receive summary of needs assessment results (educational profile)
7. Consider starting a Learning Initiative Team

NEEDS ASSESSMENT PARTNERS AND ROLES

In the margins above, write the names of persons from this organization next to the appropriate partner descriptions.

Then list here some likely candidates for volunteer participants in the various needs assessment activities:

**ACTION STEP 3. ALIGN LEARNING ACTIVITIES WITH MISSION
AND GOALS**

ALIGN THE NEEDS ASSESSMENT SKILL AREAS
WITH THE MISSIONS AND GOALS OF THE
ORGANIZATION AND THE STEERING
COMMITTEE.

1. Obtain copies of the organization's mission and goal statements through the management representative on the steering committee. Make sure everyone on the steering committee understands where the organization is headed.

Summarize the organization's mission and goals here.

1. ORGANIZATION'S MISSION AND GOALS

2. Now refer to Priority Learning Topics in Action Step 1 on page 86. Copy that list here and relate each learning topic to the organization's mission and goals by discussing how each learning activity can further the common vision and purpose of the work that is done here.

2. ALIGNING LEARNING TOPICS WITH MISSION AND GOALS

<u>LEARNING TOPIC</u>	<u>CONNECTION TO MISSION AND GOALS</u>

3. Re-visit the steering committee mission statement you created in Chapter Two on page 75. Copy it here.

STEERING COMMITTEE MISSION

Based on the above exercise and your stated group mission, develop a list of steering committee goals for the workplace learning program that you will implement.

Hint: A goal is an action statement that indicates what you are going to do to carry out your mission. Use action verbs, one action per goal. Each goal identifies a performance outcome. It can also include a target date and a cost (in time or money). Here is a simple way to write a goal.

Goal:	To (action verb) (performance outcome) by (target date) at (cost).
-------	---

Example: To interview three peers each regarding workplace learning opportunities by February 7, 1993, at a cost of three hours per committee member.

Write your agreed upon steering committee goals here:

STEERING COMMITTEE GOALS

ACTION STEP 4. CONDUCT PEER INTERVIEWS

Learn interview skills and adopt a list of questions to ask peers in an informal, introductory information-gathering process.

The first part of the needs assessment is an informal, information gathering activity conducted by the steering committee through interviews with peers. In order to conduct these interviews, three things need to occur:

1. a two-part training exercise in interview skills
2. a selection of interview questions from the list of sample questions on pages 94 - 103.
3. a plan for conducting the interviews

1. INTERVIEW TRAINING

Effective interviewing is a communication process that involves two specific skill areas: (1) asking questions, and (2) active listening. The training that follows will help you gain confidence in your question-asking and listening abilities so that your interviews will flow smoothly and give you the information you need to build a good learning program. The following two exercises were developed by Michael Colburn of Colburn and Associates.

Asking Questions and Active Listening [1]

An effective communicator creates an environment which fosters trust, openness and support. Two types of communications, asking questions and active listening, are essential. In this handout, you will be given some tools to help you refine these skills.

ASKING QUESTIONS

Questions are the midwives for the birth of full expression. The first principle of asking good questions is to have a sincere desire to hear the other person's answer. Often people use questions to express an opinion (Why did you do that?). We will review five types of questions and discuss how and when they can be used to gather information.

Open-Ended Questions

An open-ended question is designed to open up a topic that the group is interested in exploring. It cannot be answered with a simple statement of fact. It gives the other

person a maximum amount of latitude when answering.

An Example: WHAT HAVE BEEN SOME OF THE PROBLEMS EXPERIENCED IN OPERATING THIS EQUIPMENT?

Moderate-Focus Questions

An open-ended question generates a wide variety of responses. They open up avenues for exploration. A moderate-focus question is narrower in scope, but it still cannot be answered with a simple statement of fact. It helps you focus the discussion to a topic in which you are interested in gaining additional information.

An Example: TRAINING ON THE OPERATION OF THE EQUIPMENT SEEMS TO BE A MAJOR ISSUE. WHAT ARE SOME OF THE THINGS THAT PEOPLE NEED TO BE TRAINED TO DO?

Directive Questions

A directive question asks for a statement of facts. How many? When? How long? They bring a level of specificity to the issue at hand. You will also determine what the other person knows and doesn't know about the topic.

An Example: HOW MANY UNITS CAN THIS EQUIPMENT SORT PER HOUR?

Closed-Ended Questions

A closed-ended question can be answered by a "Yes" or "No" or by a limited number of responses. Closed-ended questions are used to obtain an opinion, make a decision, or bring closure to the interview.

An Example: ARE WE READY TO CHOOSE A SOLUTION FOR THIS PROBLEM?

Secondary Questions

A secondary question is used to obtain information that was not obtained from a previous question. These may ask for clarification or elaboration.

Examples: WOULD YOU ELABORATE ON THAT? or WHAT DO YOU MEAN BY QUALITY?

Funnel Sequence of Questions

Each type of question may be used during an interview or a group session. Often, an effective sequence of questions resembles a funnel.



Open-Ended

Moderate-Focus

Directive

Closed-Ended

At the top of the funnel, an open-ended question may be used to get the discussion started on an issue of concern.

As information is generated, the questioner may then use moderate-focus questions to bring some structure and direction to the discussion.

Directive questions may then be asked to determine what facts there may be to support a conclusion.

Finally, a closed-ended question may be used to bring closure to the discussion and make decisions.

ACTIVE LISTENING

When we are listening actively, we are giving our full attention to the speaker. We listen, not just to the words, but to the meaning and feelings behind the words. As we listen in wholeness, we are also able to listen to the values that the other person holds. Listening in wholeness provides an opportunity for a group to develop *esprit*—and to become a team.

Some Hints:

- *Clear your mind of distractions. Particularly let go of your desire to express your opinion.

- *Maintain reasonable eye contact.

- *Listen to the whole message and to the whole person. Avoid jumping to conclusions or making judgments.

*From time to time summarize the speaker's message and feed it back to him or her.

*As necessary, ask questions for clarification.

*Take notes as necessary.

AN EXERCISE

1. Pair up with a colleague.
2. Have one person talk for two to four minutes, completing one of the following:

A PROBLEM THAT I AM HAVING A DIFFICULT TIME SOLVING:

ONE OF THE MOST CHALLENGING THINGS I AM WORKING ON NOW IS:

3. During the talk, the listener is to listen actively and to ask questions as appropriate. The focus should stay on the speaker and the topic s/he chose.

Hints to the listener:

*Occasionally summarize the content and/or feelings of the speaker's message.

*Ask questions as appropriate to obtain needed information.

*Avoid giving advice. Help the person identify and/or solve his or her own problem.

*At the end of the talk, ask the speaker to summarize the issue or problem as s/he understands it. Provide summary comments as appropriate.

4. After the talk, the speaker should give the listener some feedback on his or her listening and questioning skills.

AS A LISTENER, I LIKED IT WHEN YOU ...

AS A QUESTIONER, I LIKED IT WHEN YOU ...

TO IMPROVE YOUR LISTENING, THE NEXT TIME, I SUGGEST THAT YOU ...

TO IMPROVE YOUR QUESTIONS, THE NEXT TIME, I SUGGEST THAT YOU ...

5. Switch roles and repeat Steps 1 through 4.
6. Summarize what you learned by finishing the following sentences:

I DISCOVERED THAT I ...

I INTEND TO ...

2. SELECTION OF INTERVIEW QUESTIONS

The Funnel Sequence of Questions presented in the interview training can help focus the steering committee in its selection and sequencing of interview questions. Review the following as you decide on the questions you want to use in interviewing your peers about workplace learning.

- The purpose of the needs assessment and the learning program
- The two sets of sample questions that follow

How to Assess the Need for Workplace Education in Your Company[2]

Take the time to complete the following. It will help you to discover more about your workplace education needs, and to plan strategies to meet those needs. Check what is relevant and make notes about the conditions in your company.

- Have you computerized, or are you planning to computerize, your production or service technology?
- Have you adopted, or are you thinking about adopting, team-based, employee-centered management styles?
- Is your workforce the same as it was five years ago, or has it changed?
- Who are the workers in your company now? Describe them according to race, gender, age, skills, and education levels.
- Do you think your workforce needs new skills to keep up with changes in technology and types of management (or with other changes in your company)?
- What evidence supports your answer to this question?
- Do you suspect that your workforce needs or will need:

Improved English language skills
 Improved reading skills
 Improved math skills
 Instruction for performing new tasks like statistical process control?
 Team building skills
 Problem-solving skills
 Other skills
 I need more information before I can make a judgment

- What is the product which your company or agency produces?

Object of some kind (name it)
 Service of some kind (name it)
 Combination of object and service

- Describe the overlap between object and service. (For example, a manufacturer of temperature controls also sells those controls. Customer service can, therefore, be seen as a product which the manufacturer also produces).
- Do you want to improve the quality of your product? Explain.
- What is your overall strategy for improving the quality of your product? Describe the actual steps that you are taking.
- Could a workplace education program be part of your strategy to improve the quality of your product? How? Why Not?

I need more information before I can make a judgment.

- Do you think that a workplace education program can help you reduce the cost of your product? How? Why Not?

I need more information before I can make a judgment.

- Where could you look for obvious and "hidden" cost benefits of a workplace education program in your company?

More efficient use of supplies
 Less hiring of substitute help
 Less time spent in translation and/or giving directions
 Less scrap produced
 Creating a safer working environment; fewer accidents
 Less sick time
 Less staff turnover
 Fewer workers' compensation claims
 Other

- Immediate dollar savings are not always the benefits of a workplace education program which managers, supervisors, or union leaders think are the most important. Try to identify workplace education benefits to your company that are worthwhile in the short term, but not necessarily cost-saving until the long term,

and then in the broadest sense? (For example, think about the long term results of increased communication among workers, increased innovation and risk taking, and increased safety.)

- Do you provide any kind of education or training to your employees, either managers or line workers?
- Describe the education and training you currently provide: names of seminars or courses, their purposes, who enrolls, cost, and how trainers and enrollees generally evaluate these offerings.
- Is everyone who should be enrolled in these courses participating fully? If no, who are these employees?
- Does your training and development unit—large or small as it may be—have the capacity to provide basic skills instruction?

Sample Questions to Determine Workers' Educational Needs[3]

Discussions with workers:

1. What changes have you seen in your job?
 - a. What training are you getting to help you learn new job skills?
 - b. Are there changes you would make in work practices that would help you perform your job?
 - c. Does the equipment you use make your job easier?
2. Which of these basic educational skills do you use most in your work? Which ones to you use less often?
 - a. Reading?
 - b. Writing?
 - c. Oral communication?
 - d. Math?
 - e. Problem-solving?
 - f. Others?
3. What kinds of written materials do you use in your job?
 - a. Procedures manuals?
 - b. Inventory sheets?
 - c. Operating instructions?
 - d. Safety notices?
 - e. Job descriptions?
 - f. Employee benefits handbooks?
 - g. Others?

4. What difficulties do you have when you use those written materials?
 - a. Hard to use?
 - b. Written in complex or confusing language?
 - c. Other specific problems?
5. What training have you been given to help you use these materials?
 - a. Training in classroom setting?
 - b. Informal training by another worker?
 - c. Other training?
6. Are the written qualifications for your job realistic, considering the work to be performed?
 - a. Are further skills appropriate for doing the job?
 - b. What problems do you encounter performing your work?
 - c. Should the work be redesigned? (If so, in what way?)
7. What would help you perform your job better?
 - a. Different equipment?
 - b. Different work practices?
 - c. Education or training?
8. What additional skills would you need for job advancement?
 - a. How long have you worked in your current job?
 - b. What are the jobs to which you might advance (either with this employer or elsewhere?)
 - c. What new skills do those jobs require?
 - d. What education or training would help you acquire those skills?
9. What kinds of reading do you do?
 - a. Reading for pleasure?
 - b. Reading the newspaper?
 - c. Reading to your children or grandchildren?
10. Have you taken GED or adult education classes to improve your reading skills?
 - a. What did you like or dislike about that program?
 - b. Did you complete the program?
11. Are you interested in continuing your education?
 - a. What subjects interest you?
 - b. Would you like to complete your high school degree?
 - c. Take a college prep course?

- d. Enter a college degree program?
 - e. Take a specialized technical course?
 - f. Study for the citizenship exam?
 - g. Take other courses?
12. Aside from work, how would further education help you with your home and family responsibilities?
 13. What additional services would make it easier for you to attend classes (for example, child care?)

Discussions with sympathetic supervisors:

1. What general problems do workers have performing their jobs?
2. What training does the employer currently provide to address this?
3. What changes might help workers perform their jobs better?
 - a. More education and training?
 - b. New equipment?
 - c. Restructuring of work processes?

Discussions with crew leaders, supervisors and other worker representatives:

1. What changes are taking place in the workplace?
 - a. Has new equipment or new technology been introduced?
 - b. Have work practices changed?
 - c. Have layoffs taken place?
 - d. Have new jobs been created? Or old jobs restructured?
2. Are members troubled by new assignments?
 - a. Problems with new equipment?
 - b. Concern about increased reading, writing, or math?
 - c. Have they filed grievances over new job assignments, which may reflect the above problems?
3. Are workers aware of new job opportunities, and do they apply for the jobs?
 - a. Do new job openings have formal education requirements?
 - b. If so, do your members meet these requirements?
4. Do members attend local adult education programs?
 - a. Are they satisfied with the programs?
 - b. Have they dropped out of such programs?

5. Does the union (or employer) offer a tuition reimbursement program?
 - a. Do members use it?
 - b. What kinds of educational programs are they taking?
6. Do members understand the terms and conditions of their fringe benefits, such as health, legal, and education?
7. Do any government certification requirements affect members' jobs (as has been the case with nurse aides, school firemen, etc.)?

Mark the questions you would like to use on the lists provided. Add other questions that you feel are relevant to your purpose and people. Then put the questions into a practical sequence, remembering the funnel of open- and closed-ended questions. Have someone type up the list and distribute it to committee members so you can review it before finalizing it in preparation for your interviews.

3. A PLAN FOR CONDUCTING THE INTERVIEWS

Create a plan for conducting your peer interviews. Include the following information:

- How many people will each member interview?
- Where and when will the interviews take place?
- What is the target date for completion?
- How will the information be summarized and shared?

Outline your plan in the space below.

PEER INTERVIEW PLAN

ACTION STEP 5. PLAN FOR THE IMPLEMENTATION OF THE NEEDS ASSESSMENT ACTIVITIES

1. Scheduling and locating interviews and focus group sessions
2. Recruiting volunteers
3. Orienting facilitators and participants
4. Budgeting and costs
5. Involving of and coordinating with supervisors
6. Monitoring needs assessment activities.

One of the primary functions of the steering committee is to organize the events of the needs assessment and the subsequent workplace learning program. A Summary of the Needs Assessment Components appears at the end of this chapter. The needs assessment uses four types of activities to collect information: 1) focus groups, 2) interviews, 3) walkabouts and 4) work document reviews. These four processes are described here.

1) A **focus group** is a way to get a group of people to focus on a common theme for the purpose of gathering opinions, evaluations and perceptions based on participants' experience with the topic of focus. The focus groups will be used for gathering information about the present use of interactive skills in the workplace.

2) An **interview** is a conversation planned around certain pre-determined topics for the purpose of gathering information about those topics. It is a dialogue between an interviewer who asks the questions and an "expert" who answers the questions based on personal insights, perspectives and experiences.

3) A **walkabout** is a way for a learning specialist to be with an employee on the job to discover the kinds of skills the employee actually uses in the process of doing work. Walkabouts are conducted with outstanding employees and are used to gain insight into what the work requires.

4) A **work document review** is a way for a learning specialist to look at the different kinds of paperwork used on the job to determine the skills needed by employees who are responsible for communicating information to others through that paperwork.

The following workboxes provide opportunity to focus on some of the organizational decisions that have to be made. Discuss each topic until consensus can be reached as to how it can best be accomplished in your organization. Then summarize the committee's decision in the space provided.

1. Scheduling and locating interviews and focus group sessions

2. Recruiting volunteers for needs assessment activities

3. Orienting facilitators and participants

4. Budgeting for costs

5. Involving and coordinating with work supervisors

6. Monitoring needs assessment activities

ACTION STEP 6. ESTABLISH POLICIES AND PROCEDURES

1. Work release time for volunteers
2. Individual assessment
3. Confidentiality regarding reading levels and test scores
4. Open information to participants
5. Team formation and levels of team autonomy
6. Service provider recruitment and selection
7. Consequences of employee achievement/mastery
8. Program evaluation (see Chapter 7.)

The steering committee will need to make some policy decisions on the issues listed above. Each organization will handle these issues differently, based on the present organizational climate, the shared understanding of what makes a healthy learning environment, and the capacity of the organization to support the requirements of the learning program.

Discuss each issue and decide, as a group, how it should be handled. Consider all the stakeholder groups who will be affected. Then write your steering committee policy decision in the space provided.

1. Work release time for volunteers

2. Individual assessment

3. Confidentiality regarding reading levels and test scores

4. Open information to participants

5. Team formation and levels of team autonomy

6. Service provider recruitment and selection

7. Consequences of employee achievement/mastery

8. Program evaluation

ACTION STEP 7. CREATE AN EDUCATIONAL PROFILE

REVIEW AND DISSEMINATE THE EDUCATIONAL PROFILE, AND RECOMMEND LEARNING PROGRAM COMPONENTS

The Needs Assessment provides the information necessary to create an Educational Profile. This profile translates the data from all the needs assessment components into descriptions of (1) the various skills and levels of performance required by the work environment, and (2) the present competency levels of the participating employee groups in the skill areas assessed.

The coordinating facilitator will work together with the other participating consultants to write the Educational Profile from the information collected from all participants. This document will allow the steering committee to make informed recommendations on learning components for the first Learning Initiative Teams. An educational profile will include the following information.

EDUCATIONAL PROFILE: Sample Format

<u>SKILLS ASSESSED</u>	<u>OBSERVATIONS</u>	<u>RECOMMENDATIONS</u>

Like a mission statement, an educational profile is a fundamental document in the workplace learning program. It provides the feedback that lets the steering committee know how it's doing. It is a transition point marking both an end and a beginning: the end of the needs assessment process (which has been a learning process for the steering committee), and the beginning of the process that creates a structure for the learning program. The educational profile provides the kind of feedback that a traditional test provides a student, but it goes much further, for it contains, within itself, the information necessary to take the next step in a real situation.

CONCLUSION

In this chapter, you have organized and coordinated a needs assessment for the workplace learning program you will be implementing. Through these activities, you have learned how to work together as a team to carry out

necessary tasks. You have also developed new capacities for solving problems and designing effective group processes of your own. And you have hopefully learned some important new things about your organization's learning needs as a result of your efforts.

Now you are ready to use the information gleaned from the needs assessment to identify the learning components you want to recommend to Learning Initiative Teams. This will be the focus of Chapter Four.

SUMMARY OF NEEDS ASSESSMENT COMPONENTS

I. INFORMAL DISCUSSIONS AND INTERVIEWS WITH PEERS

Following the principle that "Education is the first act of any work process," the steering committee initiates the work of the learning program by inviting input from peers and colleagues as to the kinds of learning opportunities most needed and desired.

A. Peer Interviews Conducted by Steering Committee Members

Steering committee members conduct informal interviews with their peers and colleagues to discover current understandings of the relationship between work and learning, and to find out what needs people are presently feeling regarding workplace learning opportunities. (Sample questions and interviewing instructions are provided on pages 86 - 95.)

II. ASSESSMENT OF INTERACTIVE SKILLS

The Interactive Skills include: oral communication, creativity, problem-solving, teamwork, leadership, influencing and organizational effectiveness, as practiced by all employees.

A. Focus Groups

A focus group is a way to get a group of people to focus on a common theme for the purpose of gathering opinions, evaluations and perceptions based on participants' experience with the topic of focus. The focus groups will be used for gathering information about the present use of interactive skills in the workplace.

Three (or more) 10-member volunteer groups are enlisted to participate in confidential, half-day focus groups. Each group gathers at a comfortable off-site location with a neutral outside facilitator. The facilitator typically asks open-ended questions and invites discussion on how participants presently use the interactive skill areas listed above. Future learning opportunities for enhancing interactive skills are also explored. Participants are best able to discuss and demonstrate their experience in these areas in a group setting where thoughtful interaction is called for.

Outcomes of the focus groups include: 1) a general description of participants' present awareness and competence in these skill areas; 2) employees' assessment of their present ability to use interactive skills in this work environment; and 3) an identification of the kinds of learning opportunities that would enhance the practice of interactive skills in this workplace.

B. Individual Interviews with Supervisors and Managers

A facilitator will interview supervisors and managers using questions that parallel the focus group sessions described above. These individual interviews give leaders an opportunity to express their perceptions of employees' current opportunities, strengths and learning needs, relative to the interactive skills.

III. ASSESSMENT OF CORE COMPETENCIES

The core competencies include: oral communication, writing, reading, computation and their translation into practical usage on the job.

A. Collection and Analysis of Sample Work Documents

Steering committee members and other employees assist in gathering work documents they use regularly, such as schedules, production worksheets, inventory sheets, memos, letters, proposals, budgets, balance sheets, quarterly reports, purchase orders, incident reports, etc. A local literacy consultant assesses these documents for the ability levels they require. The consultant then uses the documents to identify literacy needs and expectations in the workplace, including current and future uses of the core competency skill areas listed above.

B. Identification of Workplace Learning Masteries based on Exemplary Employee Practice

Outstanding employees are selected for walk-about with a learning specialist, so that the specialist can discover what skills they use in their daily work. Through this 2-3 hour "shadowing" process, the core competencies of successful employees are identified. These "skills of actual practice" help determine criteria for specific literacy and learning masteries for different types of jobs.

IV. ASSESSMENT OF LIFE SKILL FOUNDATIONS (A Neutral Facilitator Interviews Volunteer Employees)

Life Skill Foundations include the foundations of (1) Personal Mastery and (2) Learning Process Skills. Personal Mastery includes personal techniques for goal setting, for maintaining high self-esteem, for growing and learning new things, and for planning ways to advance in one's job and create better life opportunities for oneself. Learning Process Skills include an awareness of how one learns best, as well as techniques for gathering needed information and experience, making sense of it, and transforming it to make improvements and accomplish meaningful work.

Volunteers are invited to be interviewed regarding their experiences with the two skill areas of (1) Personal Mastery and (2) Learning Process Skills. These interviews will be conducted by an outside interviewer and kept confidential. The data and stories will be used to help determine appropriate program components for expansion of employee skills in these two areas.

FOOTNOTES FOR CHAPTER THREE

1. "Asking Questions and Active Listening", Colburn and Associates, 1992.
2. "An Employer's Guide to Planning Adult Basic Skills Programs in Small Business and Industry in Massachusetts," Laura Sperazi, 1991, pages following page 17.
3. "Workplace Education From A to Z," A Handbook for SEIU Local Union Leaders, 1992, p. 19.

If you want to find out how alive a group's organizing ability is, listen for the quality, range and frequency of their one-to-one dialogues with each other. Dialogue is the acorn-seed of accord from which the giant oak-trees of sustainable organizations grow.

Here is a process that can help you re-energize your dialogues:

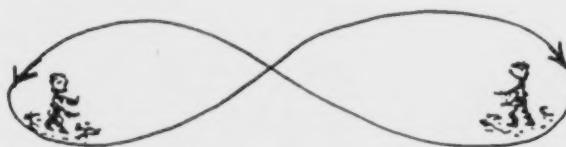


This familiar shape has many names and variations. Drawn horizontally, it's the infinity symbol. Drawn vertically, it's a figure eight. In mathematics, the Mobius strip is a one-sided surface formed by joining the ends of a narrow rectangle (you can do it with a strip of paper) after twisting one end through 180 degrees. When you attach the two ends, they look like a three-dimensional version of this same infinity symbol. The Mobius strip has been used as a picture of the universe to explain scientific concepts like relativity and time travel.

A more recent variation of this pattern comes from water flow research done by German scientist, Theodor Schwenk, founder of the Institute for Flow Sciences in West Germany. Schwenk has shown that "dead" water (most city water is "dead" compared to mountain streams) revives itself by flowing in this figure-eight pattern. Flowform cascades are now being created with a series of tiers that allow water to flow in the figure-eight pattern at each level before descending to a lower tier. The same flow pattern happens again through each tier until the water reaches the ground. When water flows through these figure-eight patterns, oxygen is restored. Water treatment plants are now using these flowforms to purify city water supplies. Flowforms are also being built by artists who are intrigued by the sculptural possibilities of these many-tiered cascades that sometimes resemble human vertebrae. Residential therapeutic centers have flowforms installed not only for the aesthetic beauty of the sculptural forms, but also for the healing effects the sound of the water has on the residents.

This water flow pattern is a useful picture for how you can shape the information flow when you engage in dialogue with another person.

Here is the pattern:



Here's how it works:

Your thoughts and feelings and activities start at one end of the loop and flow toward the other person.

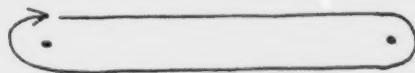
The other person's thoughts, feelings and activities stream toward you from the opposite loop.

The point where they cross in the middle is where you actually meet each other. This kind of meeting happens when you align with each other, when you really know each other, when you come to agreement and can act with one mind together.

The quality of dialogue that happens when you keep that meeting point of perfect accord in your attention is like the water that has its oxygen restored. A feeling of being enlivened or re-energized often occurs. It's not realistic to think that there will be perfect accord on every point that comes up in your conversation, but if there is at least one thing, and preferably a few key themes, that you can both feel completely together on, a new dimension of trust is created between you.

Stephen Covey calls this trust dimension "psychological air." In his book, *The Seven Habits of Highly Effective People*, he refers to "psychological air" as the space we create (or fail to create) in our communications with each other. If the psychological air between us is good, we feel like we can be ourselves in all our expansiveness around each other. If it's not so good, we may feel like we are suffocating because the space is being taken up by something that's not appropriate for us to "breathe in." Paying attention to the "psychological air" we take in -- and breathe out -- awakens us to a new dimension of personal mastery in the art of communication.

Notice that the pattern is not this:



But this:



It's easy to send and receive information back and forth without ever experiencing the coming together and the sense of mutual accord that accompanies genuine dialogue. Misinformation, mixed up messages and discord result from the parallel information flow model. Communication becomes mechanistic and cold if people never actually meet each other at that point of accord in the middle.

There are certain forms and patterns that invite us to draw them, imagine them, and move them with our arms and legs. This infinity symbol seems to be one of them. Have you ever noticed how often this pattern appears in random doodles? Not only is it fun to draw, it can also have an invigorating effect when you move through it. Specifically, this flow pattern invigorates our one-to-one communication by reminding us to come to a point of true accord with the other person as we keep dialogue the central focus in the information flow.

Chemical Abstracts International has recognized the importance of dialogue in its organizational life and has instituted a special system to encourage it. Developed by Michael Colburn, the Priority Feedback System teaches Chemical Abstracts employees how to set up regular, one-on-one meetings with their bosses to identify priorities in their work and have a chance to talk these over in a focused, private meeting. The meeting is always run by the employee. Both parties are trained in the techniques for participating in this meeting. Each person keeps records of the dialogues, and these later become the basis for employee-initiated self-improvement plans. The Priority Feedback System was started in one department and soon spread to other departments until it has become a standard Chemical Abstracts practice.

Organization is the ability to sustain dialogue at more and more complex levels. It is built on agreement, on keeping our word, on being of a single

mind about certain key things. As you doodle with infinity symbols, give your communications a new twist -- find the meeting point in your dialogues and give each other the "psychological air" you need to discover the accord, the "one mind" that you share. By practicing this kind of dialogue in the midst of your information flow responsibilities, you might hear someone unexpectedly say to you, "Hey, we've got to start meeting like this!"

CHAPTER 4. LEARNING COMPONENTS

"The clearer that students, supervisors, managers, union representatives, and other interested parties can be about what needs to be improved in the company, and how education for these improvements fits with the company's long-term goals, the more accurate the curriculum will be."

- Laura Sperazi, *Education in the Workplace*, 1991

OVERVIEW

In the last chapter, you coordinated a needs assessment process that resulted in an Educational Profile of the learning needs discovered in this organization. Now it is time to take that information, compare it with some of the new national recommendations for workplace skills training, and identify learning components that would develop this organization's human capacities most appropriately. The steering committee will present these recommendations to the Learning Initiative Teams, once they have formed. Each Learning Team will have the opportunity to decide together on a particular learning component for their team. Steering committee recommendations can provide a knowledge base for those decisions. **Mastery Process #4** explodes popular definitions of the word "information" and challenges you to form yourself from within by "Finding Your Key Vocabulary."

A learning component is the focus of learning around which each Learning Initiative Team gathers. It is the content, the subject matter, the learning topic that a group of learners decides to master. If selected with care, it becomes the magnet that holds the group together. The bottom line becomes: "We really want to learn this."

Adult learners can take charge of their own learning, and do so all the time, either more or less consciously. Learning is a natural activity and a human right that interweaves with all of work and all of life. Rather than leaving the identification of learning components strictly to the "experts" or to "chance," this program assumes that employees at all levels can decide what they want to learn and participate in setting up a means through by which they can learn it.

The needs assessment you have now completed provides an objective starting point for identifying learning components for the first cycle of learning activities. This chapter helps you transform the needs assessment results (the Educational Profile) into suggestions for learning components around which Learning Initiative Teams can form.

OBJECTIVE

Recommend learning components for the first cycle of Learning Initiative Team activities

PROCESS

- Review ASTD's 7 Workplace Basics
- Review SCANS' 5 Competencies and 3 Foundations
- Review Educational Profile from Needs Assessment
- Review Organization's Mission, Goals & Future Plans
- Relate Organization's Improvement Plans to Learning Goals
- Recommend Learning Components

ACTION STEPS

ACTION STEP 1. REVIEW THE ASTD'S* "SKILLS EMPLOYERS WANT" AS ONE SOURCE OF IDEAS FOR LEARNING COMPONENTS

*American Society for Training and Development

1. ASTD's Seven Workplace Basic Skill Areas

- Check the skill areas that this organization needs to develop.
- Put a check mark by each one you want to get started on now.

ASTD's Workplace Basics

- | | | |
|-----|-------------------------|--|
| --- | 1. The Foundation: | Learning how to learn |
| --- | 2. Competence: | Reading, writing and computation |
| --- | 3. Communication: | Listening and oral communication |
| --- | 4. Adaptability: | Creative thinking and problem solving |
| --- | 5. Personal Management: | Self esteem, goal setting, and personal and career development |
| --- | 6. Group Effectiveness: | Interpersonal skills, negotiation and teamwork |
| --- | 7. Influence: | Organizational effectiveness and leadership |

ACTION STEP 2. REVIEW THE SCANS* WORKPLACE SKILLS AS A SECOND SOURCE OF IDEAS FOR LEARNING COMPONENTS

* Secretary's Commission on Achieving Necessary Skills
(U.S. Department of Labor)

SCANS 5 COMPETENCIES AND 3 FOUNDATIONS

- Check the skill areas that this organization needs to develop.
- Put a check mark by each one you want to get started on now.

Five Workplace Competencies

- 1. **Resources** – You know how to allocate time, money, materials, space, and staff.
- 2. **Interpersonal Skills** – You can work on teams, teach others, serve customers, lead, negotiate, and work well with people from culturally diverse backgrounds.
- 3. **Information** – You can acquire and evaluate data, organize and maintain files, interpret and communicate, and use computers to process information.
- 4. **Systems** – You understand social, organizational, and technological systems; you can monitor and correct performance; and you can design or improve systems.
- 5. **Technology** – You can select equipment and tools, apply technology to specific tasks, and maintain and troubleshoot equipment.

Three Foundations

- 1. **Basic Skills** – Reading, writing, arithmetic and mathematics, speaking, and listening.
- 2. **Thinking Skills** – The ability to learn, to reason, to think creatively, to make decisions, and to solve problems.
- 3. **Personal Qualities** – Individual responsibility, self-esteem and self-management, sociability, and integrity.

ACTION STEP 3. REVIEW THE EDUCATIONAL PROFILE OF THE NEEDS ASSESSMENT

Obtain a copy of the Educational Profile from the facilitator. Discuss the main points, using your peer interviews as a reference. Highlight the skills recommended for learning components.

EDUCATIONAL PROFILE RECOMMENDATIONS

Briefly summarize the Educational Profile Recommendations here:

List any additional improvements and learning needs suggested by the peers you interviewed:

**ACTION STEP 4. REVIEW THE ORGANIZATION'S FUTURE WORK
IMPROVEMENT PLANS, BASED ON ITS STATED
MISSION AND GOALS**

Organizational mission and goals

Most organizations have a written mission statement that identifies what business they are in, who their customers are, what direction they are taking into the future, and what values they uphold in the process of delivering their product or service. Ask the management representative on your steering committee to provide you with copies of the vision, mission and goals statements of your organization.

Write your organization's mission here:

The mission drives a set of strategic goals that determine day to day policy. A goal could be to have zero defects, less turnover, or more employee-initiated improvements.

Write some of your organization's strategic goals here:

List any planned organizational changes or new work processes that are being talked about for the near future.

**ACTION STEP 5. RELATE NEEDED ORGANIZATIONAL
IMPROVEMENTS TO LEARNING GOALS**

On the left, list what needs to be improved in the organization. On the right, identify the learning goals that best support these improvements and align with the organization's long-term goals.

NEEDED IMPROVEMENTS	LEARNING GOALS FOR THOSE IMPROVEMENTS

ACTION STEP 6. RECOMMEND SPECIFIC LEARNING COMPONENTS BASED ON ACTION STEPS 1-5

The learning components you recommend here are like a blueprint. They provide an accurate plan to follow. They are still subject to revision, however, based on people's response to the invitation to form Learning Initiative Teams.

LEARNING COMPONENT RECOMMENDATIONS

Based on the above information, identify the learning components that the steering committee recommends for this organization. Star (*) the ones you would include in the first cycle of the learning program.

CONCLUSION

You have now identified learning components that you think would be in a good workplace learning program. The next step is to form a number of Learning Initiative Teams that will engage in specific learning activities for a six to eight week cycle. The formation of Learning Initiative Teams is the theme of Chapter Five.

As an individual steering committee member, one thing you can do to prepare for the development of Learning Initiative Teams is to ask yourself the following question:

"Are any of the above learning components interesting enough to me that I would consider "championing" a Learning Initiative Team on that topic?"

The first Learning Initiative Teams will need careful nurturing to get off to a good start. Steering committee members would make excellent "nurturers," "champions" and "midwives," ensuring the healthy development of these first teams. Please think about it!

MASTERY PROCESS #4 FIND YOUR KEY VOCABULARY

Is human learning only about information flow? Is it enough to simply become super-efficient human information-processors? Will our work organizations transform themselves appropriately for the twenty-first century if workers transform themselves into information experts?

It depends on what we mean by information. And it depends on what relationship each person has to that information. Information can mean "finished facts" or it can mean "that which forms from within." If we only receive and pass along finished facts, we rob ourselves and others of the richness of humanity. We trust newscasters to tell us about the most important local and international events, only to discover that the most significant things going on in neighborhoods and world alike are the deeper human realities that are never highly publicized.

If, on the other hand, we use the word information to mean "that which forms from within," we are no longer captives of the finished facts. We form ourselves from within when we expand our capacities for perception, feeling and serviceful action. We become the potters shaping the clay of our own lives by the ideas we allow to work on us from the inside out. In-formation, in this sense, can only happen when an individual decides to re-create him or herself through active, inner work. What would this work be?

First of all, it would be a personal treasure hunt, where the prize would be to wake up out of a long, troubled sleep and discover you had come into an incredible inheritance. It would be an active search for the words that pointed the way out, or the way in, however you see it.

In her book, *TEACHER*, Sylvia Ashton-Warner, an English school teacher in a school for native Maori children in New Zealand, describes her discovery of a way to teach the young children to write and read, using what she calls their "Key Vocabulary." By entering into private daily dialogues with each child, she was able to pinpoint the current object of that child's most intense emotion. By naming what fully engaged that child, writing it on a vocabulary card, helping him/her say it, and giving the child the card to carry and copy, she gave them new power over their intense, raw emotions – and released them into their own ability to write. The children were soon able to write their own simple books about experiences that were important to them. They read their own books out loud to each other and soon learned to read their classmates' books. The children developed an appreciation not only for their own Key Vocabularies, but also for the unique clusters of words that described

the lives of each of their classmates.[1*] The Vocabularies were alive with the intense, primal emotions the words captured in each child's life.

An adult learner's Key Vocabulary would consist, not of words for child emotions, but of words that pinpoint personal life-themes and help answer the question, "What is my unique quest and journey?". They could be words for burning ideas, expanded emotional capacities, or future accomplishments.

Secondly, the work of in-forming oneself would be a personal biography. An objective study of one's personal biography is proving to be a helpful remedy for information overload. A program called Lifeways[2] leads participants through a process to identify key events in their lives, recognize the seven-year cycles of human growth, and clarify for themselves the important changes they have experienced in each cycle. Out of this process, an awareness of personal destiny can be born. A pattern and a purpose begin to emerge. Life begins to make sense in new ways.

THE KEY VOCABULARY HYPOTHESIS

Each person's life can be understood in terms of four to six key words, themes or phrases that keep repeating themselves to highlight the purpose, patterns, search, challenge and eventual, lasting accomplishments of that life.

The life journey is, in some respects, a quest for the Key Vocabulary, those words or "living keys" that, when discovered, give the person new power to accomplish his or her life mission. Your Key Vocabulary consists of the unique themes that give your particular life its meaning. Sometimes, it's what you know you're here to do. Sometimes, it's a quality you want to live. Or it could be a new capacity you know you need to develop in yourself. It might be something you're here to do with others, and it's a matter of finding them and co-creating a social masterpiece together. The Key Vocabulary is a set of living words you interact with to grow yourself into who you ultimately are.

The Key Vocabulary is not always easily recognized. It tends to hide beneath conscious thought. But there are certain life themes that persist in needling you for attention; they're often the things you keep shoving aside to deal with "later on." Sometimes, something has to bang you on the head, so to speak, to break through into your awareness at crucial moments. Those are often clues to one's Key Vocabulary. They reveal important themes that, when pieced together, can serve as a kind of "treasure map" through life. Looking for one's Key Vocabulary could be like the story of the drunk who is

*Footnotes will be listed at the end of the Master Process.

stumbling around late at night under a lamp post looking for his keys. A passerby stops to help him and asks, "Where exactly did you lose them?" And the drunk answers, "Well, I lost them over yonder, but it was too dark to see over there, so I started looking here under the light instead." Finding our Key Vocabularies requires that we look in the right places.

When you read biographies of outstanding people, you can often pick out the life themes that provide clues to their Key Vocabularies. This can sometimes help you find your own. Think of what you know about Abraham Lincoln. What life themes might have made up his Key Vocabulary? What were the clue-words that kept him going? It takes great courage and integrity to understand one's own Key Vocabulary and be true to it. To understand another's Key Vocabulary is a profound and intimate experience.

When learning basic skills, much emphasis is placed on the importance of expanding one's vocabulary. This has traditionally meant memorizing lists of unrelated words and their meanings. Whether we're at a basic or more advanced level, the Information Age inundates us with constant, multiple streams of unrelated words and meanings we're expected to know and process. In order to wade through and make sense of it all, personal reference points are necessary. Finding your own Key Vocabulary can provide the thread that leads you out of the modern information labyrinth and into a new richness of life that has an inherent direction, meaning and purpose.

The Key Vocabulary can give you new power over the intense flow of information that characterizes our modern age. It can provide the personal reference points through which to select, manage and channel the information that most directly affects you. And it can free you to inform yourself and expand your ability to produce the results you truly want in life.

What are the words, phrases or life themes that make up your Key Vocabulary?

As you sort through the barrage of information that pours in on you, whether it be advertising, work updates, or something you've chosen to learn, remember to look for clues and connections to your own Key Vocabulary. By actively searching for your own path in this way, you create personal guideposts that help you make the information meaningful, not only to yourself, but also to others with whom you communicate. The Key Vocabulary can open many doors.

FOOTNOTES FOR MASTERY PROCESS #4

1. Sylvia Ashton-Warner, *TEACHER*, N.Y., Bantam Books, 1963.
2. *Lifeways for Healing Education*, PO Box 971, Royal Oaks, MI 48067.

CHAPTER 5. LEARNING INITIATIVE TEAMS

Joe Mode's Notebook

A few things that boost the voltage of Zapp Teams:

- Give the team a say in who works on the teams.
- Establish a mission for the team.
- Provide time and places for the team to meet.
- Provide technical training at 'the teachable moment.'
- Provide 'people' skills for interacting, solving problems, making decisions, and taking action.

- William C. Byham, Ph.D.

ZAPPI! THE LIGHTNING OF EMPOWERMENT, 1988

OVERVIEW

In the last chapter, you used the Educational Profile, the organization's improvement goals, and other recommendations to come up with a list of learning components that are most important to you as a steering committee. Now it is time to explore the nature and function of a Learning Initiative Team and create guidelines for the formation of the teams that will inaugurate your workplace learning program. In the process of doing the work outlined in this chapter, you will be helping the teams to form and then orienting each team to the workplace learning program you have designed. **Mastery Process #5** encourages teams to let go of old competitive learning agendas and adopt the approach that says, "Get Everyone Over the Wall."

A Learning Initiative Team is a group of people who voluntarily come together to learn something of mutual interest or benefit. The team provides a semi-autonomous, small-group structure through which individuals can develop their capacities to function together as leaders, organizers and producers of their own learning.

Characteristics of a Learning Initiative Team:

- Voluntary (teams emerge informally by peer recruitment)
- Proactive (motivated to keep initiating new learning)
- Self-regulating (ability to organize and sustain itself)
- Autonomous (authority to lead and direct itself)
- Continually developing toward more complex masteries
- Three to twelve people per team

- Meets regularly over a given period of time (a "learning cycle")
- Mission and goals of the learning established by team consensus
- Learning environment and approach selected by team
- Team invites instructor-coach who can customize according to team's goals and desired approach
- Team members lead, organize and produce their own learning
- Learning is work-referenced, but not limited to work tasks
- Individual and team masteries are interdependent
- Team mastery and organizational mission are interdependent
- Each member is responsible for the success of the whole team
- Team identifies the group mastery that signals the completion of their work together
- Learning masteries are integrated into the organization's consequence system and appropriately scheduled and rewarded

OBJECTIVES

This chapter will give steering committee members an opportunity to:

1. Understand and experience the nature of a Learning Initiative Team
2. Recognize the functions of a Learning Initiative Team
3. See the benefits of joining a Learning Initiative Team
4. Identify a process for starting the organization's first Learning Initiative Teams
5. Volunteer to "champion" one of the first Learning Initiative Teams
6. Highlight the benefits of Learning Initiative Teams and help each other gather team members
7. Orient Learning Initiative Teams and help them determine their own needs, purposes, goals and best environment for learning

ACTION STEPS

ACTION STEP 1. DISCOVER THE NATURE OF THE LEARNING INITIATIVE TEAM

Identify the key features of a Learning Initiative Team and compare your steering committee to the Learning Initiative Team described in the Overview. See the steering committee as the first Learning Initiative Team, and the prototype for other teams.

One of the major tasks of the steering committee is to create guidelines for starting Learning Initiative Teams in this organization. The key features of a Learning Initiative Team are given in the Overview above and explored further in this section.

Discover and describe the extent to which this steering committee lives the definition of a Learning Initiative Team. Focus on the following aspects:

Voluntary group -

Learning that is of mutual interest or benefit -

Semi-autonomous structure -

Development of individual capacities -

Members lead, organize and produce own learning -

The steering committee is, in a sense, the first Learning Initiative Team. It becomes the prototype for all future teams. The following list of characteristics can be used to see where you are as a steering committee in the process of becoming a fully developed Learning Initiative Team as described here.

Characteristics of a Learning Initiative Team

Use the following questions to discover for yourselves the qualities that make a Learning Initiative Team unique. As you relate the characteristics to your own experiences, think of how other people you know might respond to Learning Initiative Teams.

- Voluntary - (teams emerge informally by peer recruitment)

How did you decide to become a member of this steering committee?

- Proactive - (motivated to keep initiating new learning)

What new learning tasks have been initiated by steering committee members?

- Self-regulating - (ability to organize and sustain itself)

Name three ways in which this steering committee organizes and regulates its own activities.

- Autonomous - (authority to lead and direct itself)

Identify two times when the steering committee exhibited the authority to lead itself and make decisions about its own direction.

- Continually developing toward more complex masteries

Describe three things you have learned as a part of this steering committee that go beyond your original expectations of what you would be doing in this group.

- Three to twelve people per team

How many people are on your steering committee? Is this a good number for a group? Explain your answer.

What is your recommendation for best size for a Learning Initiative Team? How does group purpose affect size?

- Meets regularly over a given period of time (a "learning cycle")

How many weeks have you been meeting as a steering committee?

Once Learning Initiative Teams get started, how many weeks should each learning cycle last? Give reasons for your answer.

- Mission and goals of the learning established by team consensus

Describe your experience of the steering committee's mission and goal setting process.

How did this experience affect your motivation to participate in the group?

- Learning environment and approach selected by team

Describe how you learn best (See the section on Customized Learning at the end of this chapter):

Is that approach available to you as you are learning new things in this group? What would help your personal learning process happen better?

In your opinion, how does this steering committee learn best, as a group?

What would help the group learning process happen better?

- Team invites instructor-coach who can customize according to team's goals and desired approach

How much input did you have in the selection of the steering committee facilitator? What recommendations would you make for the future?

Name three ways in which the facilitator is customizing activities according to the steering committee's stated goals and desired learning approach?

- Team members lead, organize and produce their own learning

1) In what way have you initiated an idea or led the group through a part of this steering committee process?

2) How have you helped to organize and build linkages for some aspect of the learning program being designed?

3) What outputs of this steering committee's learning have you helped to produce?

- Learning is work-referenced, but not limited to work tasks

1) How is the learning of the steering committee related to the work that goes on in this organization?

2) How is the learning of the steering committee different from what you do in your other work tasks?

- Individual and team masteries are interdependent

Describe a specific linkage between one of your personal goals and the mission of this steering committee.

- Team mastery and organizational mission are interdependent

Describe one specific linkage between what this committee is working on and what the entire organization is here to do.

- Each member is responsible for the success of the whole team

How are you taking responsibility for the success of the whole steering committee effort?

How are other committee members taking responsibility for the success of all group members?

What advantages can you see to this collaborative approach?

- Team identifies the group mastery that signals the completion of their work together

How will you know when your work together is done?

Are there several phases of your work that will each have its own ending? If so, identify those phases.

What group accomplishment of the steering committee will indicate to you that the workplace learning program you are creating together is finished?

- Learning masteries are integrated into the organization's consequence system and appropriately scheduled and rewarded

What are the consequences of your participation on this steering committee?

How does your work here relate to the rest of your job?

What would be an appropriate consequence of your efforts on this committee?

Your responses to these questions give you an indication of where the steering committee is in its function as a Learning Initiative Team. Through this exercise, you can see your own emerging masteries as well as needed improvements.

Taken together, the above characteristics create a dynamic system that functions as a whole to turn learning into a primary driving force in an organization's work environment. Mastery, for the steering committee, will consist in (1) building these qualities continuously into its own activities, and (2) creating a context that allows other learning teams to emerge with the same characteristics.

Learning Initiative Teams are sometimes referred to as L.I.T. groups. The relationship of a genuine learning experience to the feeling of being more alive, or "lit up" is interesting to ponder. When whole groups of people become "lit up" through their own self-initiated learning, new life-giving possibilities emerge.

As a committee, discuss your responses to the above questions. Then apply what you have learned about yourselves to the start-up of other Learning Initiative Teams. List the group's recommendations on a flipchart and include them in the box below.

Recommendations for Other Learning Initiative Team Start-ups:

ACTION STEP 2. UNDERSTAND THE FUNCTIONS OF THE LEARNING INITIATIVE TEAM

Look at the functions of Learning Initiative Teams from the perspective of each of the stakeholder groups represented on the steering committee. Recognize additional functions that new teams might serve.

To know how a Learning Initiative Team functions is to know how it works in context to do what it was designed to do. Because there are different stakeholder groups involved, each group will see the Learning Initiative Team's function according to its own perspectives and expectations. If you can bring everyone's views and hopes into the open from the start, you can ease future conflicts and get a foretaste of the potential that Learning Initiative Teams have for enriching and harmonizing the various elements of organizational life.

- Learning Initiative Teams function as wellsprings from which every new endeavor in the organization emerges. Any new activity grows out of some kind of learning. If that learning is initiated in a spontaneous and organized manner by the immediate group that needs to make a change, then the new endeavor gets off to a good start.
- Learning Initiative Teams function as vehicles through which practical knowledge is shared, allowing work groups to master new performance levels and strengthen the quality of their outcome.
- Learning Initiative Teams function as skill building units where individuals set specific mastery goals for themselves and find ways to support each other in achieving those goals.

- Learning Initiative Teams serve the learning needs of specific cultural groups, parents who want to help children with homework, and individuals who are preparing to pursue further education.
- Learning Initiative Teams serve a research and development function at all levels of the organization, allowing any group with a good idea for improvement to explore its workability through a self-organized group learning effort.
- Learning Initiative Teams fulfill a strategic planning function when managers, supervisors, staff and others need to broaden perspectives or gather information in order to chart new directions.
- Learning Initiative Teams function as cross-training groups where people with different types of expertise meet and train each other in their respective skills.
- Learning Initiative Teams serve as communication forums between departments or work groups who need a way to interface and exchange views on issues of mutual interest and concern.
- Learning Initiative Teams spring up in response to new ideas, a change in direction, a fresh approach, or a more enlightened perspective.

No matter what the function, the key to successful Learning Initiative Teams is that the motivation for starting them comes from the participants themselves, rather than being dictated by a non-participant.

Look now at the stakeholder group you represent on this committee and think of possible Learning Initiative Team functions that would specifically benefit that group.

1. Identify your stakeholder group in this organization.

What functions could Learning Initiative Teams serve for this group of people?

2. List other stakeholder groups on this committee and in the larger organization. (E.g., supervisors, production personnel, union members, accounting personnel, technicians, engineers, managers, a particular department, a particular cultural group, a particular shift, etc.)

Picture each stakeholder group forming a Learning Initiative Team. Seeing it from their perspective, what learning goal or team function might each Team select?

STAKEHOLDER GROUP

[illegible]

3. Discuss your ideas with the rest of the steering committee. Compile your lists into a common list of stakeholder groups with possible Learning Initiative Team themes for each. Include the revised list here.

STAKEHOLDER GROUP

POSSIBLE LEARNING THEME

CUSTOMIZED LEARNING ENVIRONMENTS

"A man is infinitely more complicated than his thoughts."

- Paul Valery

"Dwell as near as possible to the channel in which your life flows."

- Henry David Thoreau

Learning Initiative Teams not only fulfill specific work-related functions, but they also fulfill specific learning-related functions. Different people learn differently. These learning differences do not correspond with how smart or mature a person is. They simply reflect different pathways that are used for seeing, understanding and shaping the world. When people get to use their own pathway, their learning process feels more like coming home.

Learning activities can be customized to the needs and desires of specific learning teams by providing each team with a choice of learning environments. The term "environment" here refers to the learning approach which the team adopts. A particular learning approach can be consciously chosen, rather than the more familiar school practice of "take what you get and hope for the best."

Participants will have different needs and motivations, not only in what they learn, but also in how they learn. Following is one way to help Learning Initiative Teams organize themselves around learning preferences.

Each of the three approaches described below offers a different pathway for learning. Learning is motivated differently in each environment, and each has a different set of expectations built into the learning activities. Each environment provides varying degrees of individual and team autonomy, as well, based on the types of decisions team members are asked to make in their learning process. By recognizing there are choices as to how something is learned, teams can make their learning activities more productive and enjoyable.

Here are descriptions of three primary human learning environments from which to start:

The COLLECTIVE learning environment:

(This kind of group provides safety, stability and a supportive group atmosphere for learning.)

- A cohesive group setting
- A dependable routine with relevant subject matter
- Learn by imitation of real activities
(like "following Joe around" or "filling out this form")
- A teacher worthy of imitation
- A cooperative learning format
- Guided individual pacing
- An experiential, "familiar" context
- The least autonomous

The INDIVIDUALISTIC learning environment:

(This kind of group challenges people to do their own thinking and come up with original products to demonstrate their learning.)

- A diverse, interested and excited group of people
- A fun, challenging and different format each time
- Learn by "hanging out with" an admired role model (a mentor)
- A charismatic facilitator who has "done it all" (a maverick)
- Individual and team initiatives and projects ("dares")
- Deadlines
- An "insider" context (like a private club)
- Semi-autonomous

The COLLABORATIVE learning environment:

(This kind of group provides an opportunity for master learners to orchestrate themselves as a leaderless group, like a jazz ensemble, with each member leading and following as appropriate to the purposes of the group.)

- An awake, diverse and committed group of people
- A common mission, based on a sense of social responsibility
- Learn by applying own judgments to the situation (discernment)
- Shared leadership, planning and action
- Individuals initiate tasks to accomplish the group mission
- Group sets own timeline
- An open-ended, "self-sustaining" context
- The most autonomous

By introducing these three learning environments to potential participants while Learning Initiative Teams are forming, you can help learners create their teams, select coaches and plan activities according to the conditions and approaches that suit them best. This is one way that learning activities can be customized to the needs and desires of specific learning teams.

YOUR LEARNING

Describe an environment where your best learning has occurred.

Talk about the learning approach in terms of the following:

The learning group (if there was one)

The activity

The idea-source/resource/teacher/facilitator

The process

The timing/pacing

The context

The degree of autonomy

Other things you noticed

As a steering committee, compare and discuss each person's preferred learning environment. If you discover a variety of learning approaches represented here, how can you make sure that everyone's learning process needs are/will be honored?

Describe two or three things you could do as a steering committee to encourage Learning Initiative Teams to create appropriate learning environments for themselves:

-
-
-

Identify the steering committee's policy for customizing learning environments:

Learning Initiative Teams can serve a wide variety of functions in an organization. Each stakeholder group will see learning teams differently and will find unique ways to use them. Learning Initiative Teams make it possible to create customized learning environments based on team members' learning pathway preferences.

ACTION STEP 3. SEE THE BENEFITS OF JOINING A LEARNING INITIATIVE TEAM

Identify work-related benefits, learning-related benefits, and organizational benefits of participation in Learning Initiative Teams.

Work-related benefits for team members include opportunities to:

- Improve oneself
- Perform one's present job better
- Advance to a better job
- Participate in a team effort
- Co-create something from the ground up
- Have a say in how things are done
- See something through from start to finish
- Make work flow more smoothly
- Help the company while helping self

Add other work-related benefits that you see:

-
-
-

Star any of the benefits that directly relate to your stakeholder group.

Learning-related benefits include:

- Individuals and small groups take charge of their own learning
- The group decides what masteries, types of instruction, and learning environment will best accomplish the team's desired mission.
- Individuals continue education toward diploma or degree
- Individuals help family members and friends with their learning
- People focus their learning on something that makes sense to them
- Learning and work become integrated

- Learning is supported by a collaborative team effort
- People select their own learning partners and facilitators
- Learning groups are focused, flexible and short-term

Add other learning-related benefits that you see:

-
-
-

Star any of the benefits that directly relate to your stakeholder group.

Based on the individual benefits listed above, how might Learning Initiative Teams positively impact the organization as a whole? Think in terms of the organization's mission, goals and various stakeholder groups. Discuss this question together to identify four or five specific organizational benefits.

Organizational benefits include:

-
-
-

ACTION STEP 4. SET UP PROCESS GUIDELINES FOR STARTING LEARNING INITIATIVE TEAMS

Design process guidelines for Learning Initiative Team start-ups, based on what it would take for the steering committee to reproduce itself, in essence and function, in each new Learning Initiative Team.

"To do is to be." - Socrates

"To be is to do." - Plato

"DoBeDoBeDo." - Sinatra

- a T-shirt quote

The Hutterites were a group of German immigrant farmers who established communities in northern Canada similar to Amish farm communities in Pennsylvania and Ohio. When the Hutterite communities got too big, they would split the group in half and take a vote to decide which families would move to a different region to start a new community. In this way, the values, routines and skills of the original community were transferred and deeply established into the new one.

As the steering committee for a workplace learning program contemplates the start-up of Learning Initiative Teams, a similar transfer of values, processes, skills and authority must happen between the steering committee and the teams. The essential question facing the steering committee becomes "How will we reproduce ourselves in the Learning Initiative Teams?"

Use the following questions to help you see this re-creation process more clearly. Here are some definitions: "Qualitative" means "of higher quality," (as opposed to "having specific qualities.") "Essence" means "to be." "Function" means "to do."

1. What is the qualitative essence of this steering committee?
2. What is the primary function of this steering committee?

3. What will be the qualitative essence of a Learning Initiative Team in this organization?
4. What will be the primary function of a Learning Initiative Team in this organization?

If some people in this organization were to come to you and say, "We've been hearing about these Learning Initiative Teams, and we want to start one. How do we do it?" what would you tell them? This next section helps you develop a set of guidelines to help others initiate their own cooperative learning projects.

Use the following questions to create guidelines for starting Learning Initiative Teams in this organization.

1. What do Learning Initiative Teams need to know to begin?
2. What are the essential steps a group needs to go through to become a Learning Initiative Team?
3. What initial decisions do teams need to make? What support would facilitate their decision-making process?
4. What is the linkage and communication process between the steering committee and the teams?
5. What steering committee values, systems and practices do you want to pass on to the Learning Initiative Teams? How will you do that?

Based on the steering group's answers to the above questions, use the following worksheet to develop a one-page set of guidelines that anyone in this organization can use to start a Learning Initiative Team.

GUIDELINES FOR STARTING LEARNING INITIATIVE TEAMS AT (NAME OF YOUR ORGANIZATION):

ACTION STEP 5. FORM THE FIRST LEARNING INITIATIVE TEAMS

Volunteer to "champion" a Learning Initiative Team. Gather 3-12 members per team. Form the number of teams appropriate for the first learning cycle, including at least one steering committee member per team. Support each other as a steering committee in this effort.

Now that you have guidelines for starting Learning Initiative Teams, it is time to demonstrate how they work. Steering committee members are asked to personally initiate the first teams so the teams get off to a good start and so people can see the steering group "walking its talk." Genuine commitment is the most powerful marketing tool you have. If the program is good enough for your own participation, it will interest and engage others, as well. If you form the first teams to incorporate your own real learning goals, recruitment of others will follow more naturally because you're doing something you really want to do. That enthusiasm spreads.

The first Learning Initiative Teams can be formed through a five-part process:

- A. Decide on dates for the first learning cycle.
- B. Volunteer to "champion" a Learning Initiative Team.
(Include at least one steering committee member per team.)
- C. Form the number of teams appropriate for the first learning cycle.
- D. Gather three to twelve members per team.
- E. Support each other as a steering committee in this effort.

FORMING THE TEAMS

- A. Decide on dates for the first learning cycle.

The number of weeks you run the first session of learning team activities depends on the work rhythms of your organization. Supervisors should be included in the decision-making process so that work schedules and learning schedules are synchronized. Ideally, wait times and production down times are used for learning.

A learning cycle can be anywhere from six to twelve weeks long, with weekly, bi-weekly or even daily sessions built in. Within that period, half-day, day-long, or two to three day workshops can be scheduled for certain types of team activities. Teams can also agree to meet whenever a production run or a work project has been completed if

individual schedules can be synchronized. Different teams will have different goals and different time needs. These can be accommodated if teams take the responsibility for coordinating with each other and the steering committee sets up a clear, easy-to-use communication system.

Use the following questions to help you select dates for your first learning cycle:

THE FIRST LEARNING CYCLE

1. When are the best times for learning to happen in your organization?
2. When do the various work supervisors prefer that learning happen for the people that they schedule?
3. How many weeks long shall the learning cycle be? Why is this a good length of time?
4. What are the dates for the first learning cycle? Why have these dates been selected?

- B. Volunteer to "champion" a Learning Initiative Team.
(Include at least one steering committee member per team.)

It is at this point that the uniqueness of this workplace learning program can be most clearly felt. Even though it might seem easier to identify the "obvious learning needs" of others and demand their participation in a learning program, the effective action is to identify one's own learning needs and voluntarily begin working on them in a way that others can follow.

Pulling together a Learning Initiative Team is an act of personal courage. It asks people to make known their own learning edge. The "learning leader" must exhibit strength in vulnerability: the strength to keep the group organized around its chosen learning

goals, and the vulnerability to personally pursue the next new mastery, even if difficult. It provides an opportunity for people to develop new kinds of leadership skills. And it requires a "champion" in the fullest sense.

Because the steering committee has itself been the first Learning Initiative Team, its members are the most experienced and qualified to become the first "champions" of other Learning Initiative Teams. What do "champions" do? The following list provides some answers to that question.

IF I AGREE TO CHAMPION A TEAM, WHAT DO I DO?

1. Decide what you yourself want to learn
2. Discover a way to fit personal learning goals into steering committee plans
3. Think of two or three other people in the organization who might want to work on similar learning goals
4. Approach those people to see if they want to work on a mutual learning project together with you
5. See if they know of anyone else who might be interested
6. Let others know about the learning project you want to undertake
7. Get other steering committee members to send you potential team members
8. Develop a clear description of your learning project and give it to everyone who expresses interest
9. Set a time when all who are interested can meet and discuss the learning project together
10. Meet with interested persons and get an initial commitment

Use the following exercise to help you explore the possibility of volunteering to "champion" one of the Learning Initiative Teams.

"TO BE OR NOT TO BE...."

A LEARNING INITIATIVE TEAM "CHAMPION"

- What do I want to learn right now?
- What learning needs were identified in the organization's learning needs assessment process?

- Is there a possible match? What connections can I find between the first two questions above?
- What would be the personal benefits of volunteering to "champion" a L.I.T.?
- How would the organization benefit from my volunteering?
- What would keep me from volunteering?
- What is my decision?

I will/will not volunteer to "champion" a L.I.T. If I do,
 the learning topic of my team will be _____

C. Form the number of teams appropriate for the first learning cycle.

The number of teams appropriate for the first learning cycle can be determined, for the most part, by combining two factors: (1) the recommended learning components from the needs assessment, and (2) the specific steering committee members who are ready to volunteer as Learning Initiative Team "champions." By linking the learning content with the people available, the committee will be able to see which Learning Initiatives to encourage for the first learning cycle.

List here the recommended learning components from the needs assessment. (See the Educational Profile report.)

RECOMMENDED LEARNING COMPONENTS

List here the steering committee members who have volunteered to "champion" Learning Initiative Teams, and the learning topics they have selected.

"CHAMPION"	LEARNING TOPIC

Other factors to consider:

- How much complexity can the steering committee support the first time around?
- How open is the organizational climate to this new venture?
- Which teams have the best chance for full success?
- What learning opportunities is the steering committee, and the organization, most ready to participate in and support right now?

Discuss the above questions with the steering committee. Then list the steering committee's recommendations for the first Learning Initiative Teams here:

THE FIRST LEARNING INITIATIVE TEAMS

D. Gather three to twelve members per team.

Now that teams have been identified, team members need to be gathered. Recruitment of team members can happen at several different levels:

- Organization-wide communication through newsletter announcements, posted fliers, hand-outs, information tables
- Department and work area communication through supervisors, project leaders, staff and work group meetings
- Steering committee members' referrals through communication with their respective stakeholder groups
- Team "champions" communication with friends, colleagues, acquaintances and referrals
- Other team members' communication with their acquaintances

The learning program's emphasis on team work and self-initiative can be an advantage in recruiting teams. By inviting interested persons to become part of the immediate team effort of recruiting other members, you challenge their own self-initiative right from the start. By talking with individuals and building a real base of support for the program among colleagues and peers, you minimize the need for faceless communication, and maximize credibility at the same time.

E. Support each other as a steering committee in this effort.

Whether you volunteered to "champion" a Learning Initiative Team or not, as a steering committee member, you play an important role in the recruitment of learning team participants. You are the communication link between the steering committee and your stakeholder group. Through you, the stakeholders you represent will be able to "claim their stake" in this program. They will be able to make their wishes, needs and learning goals heard, and then participate in a learning project they find appropriate. Helping them connect with the Learning Initiative Teams at this point requires the match-making skill --and art-- of all steering committee members.

As a steering committee, discuss how you will recruit team members. Outline a coordinated plan here:

**RECRUITING LEARNING INITIATIVE TEAM MEMBERS:
STEERING COMMITTEE PLAN**

COMMITTEE MEMBER/S	ACTION/RESPONSIBILITY	DATE BY

ACTION STEP 6. PROVIDE TEAM ORIENTATION SESSIONS

Arrange for each team to meet to review guidelines, discuss the Educational Profile, informally assess its own learning needs, and decide on its learning theme (mission), its goals for mastery and its preferred learning "game plan" and environment.

Once teams become consolidated, they need to meet as a group for an initial orientation, facilitated by the team "champion." (This will probably take several sessions.)

The following hand-outs will need to be developed by the steering committee in preparation for these initial team meetings:

- Start-up Guidelines for Learning Initiative Teams
- Mission Statements of the Organization and the Steering Committee
- A "Team Self-Assessment" worksheet that leads team members to consensus on their chosen learning theme
- A "Team Mission and Learning Goals" worksheet with instructions on how to think about and write them
- A "Choosing a Learning Approach" worksheet with descriptions of different learning environments and instructions on how to choose one
- A set of guidelines on "How to Select the Right Service Provider/Instructor/Facilitator for Your Learning Initiative Team"

The initial orientation session/s should provide enough time for team members to get acquainted, talk about individual reasons for participating, identify ideal outcomes, work through the information in the hand-outs listed above, and produce the outcomes listed below.

The steering committee is responsible for providing each team leader ("champion") with appropriate facilitation support for the first team meetings.

Outcomes of the first Learning Initiative Team meetings include:

- Team self-assessment in the context of the Educational Profile
- A team mission stating the team's chosen learning theme
- The team's learning goals
- Agreement on a learning approach/environment
- Agreement on frequency of meeting and meeting times
- A plan for securing an instructor, facilitator or learning coach
- A way to communicate with the steering committee regarding the team's decisions

When the Learning Initiative Team has completed its orientation activities, it is ready to secure a learning coach, facilitator or instructor and begin its learning activities.

CONCLUSION

In this chapter, you have established one of the key elements of this workplace learning program: the Learning Initiative Teams. These teams help provide a dynamic, ongoing, flexible structure through which meaningful workplace learning can take place. In Chapter Six, you will meet and talk with a number of educational service providers so you can help Learning Initiative Teams select the service providers who can best help them accomplish their team learning goals.

MASTERY PROCESS #5 GET EVERYONE OVER THE WALL

A team is more than a group. To be a team implies a certain togetherness that can be counted on in a pinch. It means there's a common goal that everyone on the team wants to achieve. It means members are willing to do what it takes to accomplish that goal together. There's an *esprit de corps*, a "spirit of the body," a certain higher purpose that unites them and awakens a common desire to do something great together.

Outward Bound was one of the first organizations to offer worldwide, outdoor activity programs to provide trust-building experiences to people working in teams. Mountain climbing, white-water rafting and many other options challenge young people and adults alike to push themselves beyond usual limits, not only physically, but in other ways as well. There are now Ropes Courses for corporate management teams that are based on the work and contribution of Outward Bound.

One of the best Outward Bound activities comes at the end of a team obstacle course, and it's called THE WALL. Here is what team members are told when they reach it:

"You have reached the final barrier on your trip. In front of you stands **THE WALL!** It stretches endlessly to the right and left, there is no way around, under or through. Think of it as any obstacle which stands in your way -- you must confront it in order to proceed."^[1*]

The team works out strategies to get all its members over the wall in order to complete the obstacle course.

Learning Initiative Teams can be set up to "Get everyone over the WALL." Whether "the Wall" is an attitude such as boredom, mistrust, or cynicism, or whether it's a learning difficulty, a conflicting production schedule, or ridicule back at the work station, when a learning team has confidence in its ability to take on the obstacle and surmount it as a team, the learning that happens goes far beyond academic skill-building exercises.

Applying the principles of *esprit de corps* to group learning endeavors requires a major shift of mind that touches profound and subtle areas. Learning Initiative Teams will have to be pioneers, explorers and artists for a few generations in order to create and "map the territory" of team-based workplace learning initiatives. Even though there will be familiar elements,

* All footnotes will be listed at the end of the Mastery Process.

the learning potential here is expansive and new, primarily because participants are asked to build new kinds of learning relationships.

Each learner is responsible for scaling the Wall. No one is deprived the sense of accomplishment that comes from individual achievement. The advantages of working in a team are that (1) you have more possibilities together than alone; and (2) the convergence of group energy generates a momentum that can make everybody in it stronger, more talented, and more able to experience their freedom. When team members approach learning tasks in this way, they often discover they can do what once seemed impossible, simply because they're all taking on the problems together, as a team.

Sometimes, a person needs to learn alone, in solitude, without the team around. Outward Bound and other similar outdoor groups saw this, too, and built in a modern version of the ancient, native initiation rite of the Vision Quest to provide for it. People of all ages spend a great deal of time preparing for their modern Vision Quests. When they are ready, they go "solo" into a wilderness area for a period of time, sometimes two or three days, to spend time alone seeking out the object of their quest.

Even in this situation, the team travels a certain way together before the "solos" begin, and the wiser, more experienced guides help prepare participants for their ordeal. When the "soloists" return, it is to the base camp and the team that they come. Then sharing and celebration are in order. A social unit is thus formed. Bonded through mutual difficulties, the team has the potential to become a single, complex, freely-formed "organism" that develops its own special talents, qualities and capacities.

When your Learning Initiative Teams form, they will have the opportunity to move beyond individual learning practices, even beyond typical group learning activities, to real team mastery in which the team takes on a learning challenge -- and, the responsibility of GETTING EVERYONE OVER THE WALL.

FOOTNOTE FOR MASTERY PROCESS #5

1. "THE WALL," North Caroline Outward Bound Society, Morganton, NC, 1992.

CHAPTER 6. SERVICE PROVIDERS

"If you can really help us learn, you're holding the keys to the kingdom."

The trouble is, however, [in whatever way] you learned to do that before, would you please burn that boat. That's gone now. Hierarchy, linear progress, job skills, and cross-discipline training -- throw that all away. (You've got to) determine to be always a beginner."

*- John Rollwagen, CEO, Cray Research, 1992
(manufacturer of supercomputers)*

OVERVIEW

In the last chapter, you developed Learning Initiative Teams and helped them decide on a team mission and learning goals. Now they need you to lay the groundwork that will enable them to find an educational service provider who can help them master the learning they want to do together. Chapter Six introduces you to educational service providers and gives you tools and strategies for linking service providers to Learning Initiative Teams. Throughout this linking process, your role as a steering committee is to be like a clear, transparent "window" standing at the interface between the outside and the inside, helping both service providers and Learning Initiative Teams see each other better. In this way, they will have the information they need to create a good match with each other.

Mastery Process #6 challenges Learning Initiative Teams and service providers to explore, discover and invent new approaches to learning by "Transforming Learning as Usual."

Background

At a time when organizations are discovering that they need a wider variety of educational services than ever before, there seems to be an equally increasing number of local service providers who are ready to get involved in workplace learning programs. The challenge is to find ways to get the two together so there is a good match. The approach recommended here follows the principle of moving decision-making down to include the people most affected by the decision. In a workplace learning program, that means the learners who will be participating in educational activities need to have a say in who will be instructing or coaching them. To help learning teams decide who their resource people will be, an interactive process with real choices needs to be developed. Find out who is available in your community and educate yourselves about their services. In this way, the steering committee can play a key role in introducing a number of educational service providers

to the Learning Initiative Teams so they can find each other and match themselves appropriately.

OBJECTIVES

Steering committee members will be able to:

1. Discover the variety of roles, functions and offerings that are available from educational service providers
2. Locate and talk to a wide variety of specific educational service providers who work in the local community
3. Establish criteria for selecting service providers for Learning Initiative Teams
4. Design a selection process that allows individual Learning Initiative Teams to meet, interact with, and help select their own service providers
5. Create an orientation process and information packet for selected service providers
6. Involve service providers in the steering committee process during the time they are working with Learning Initiative Teams.

ACTION STEPS

ACTION STEP 1. DISCOVER THE VARIETY OF ROLES, FUNCTIONS AND OFFERINGS THAT ARE AVAILABLE FROM EDUCATIONAL SERVICE PROVIDERS

Who is an Education Service Provider?

An education service provider is in the business of leading out learners' capacities for resourcing new ideas and creating meaning from them for their lives. With individuals, educators facilitate awakenings, freedom and growth. With organizations and communities, they facilitate a renewal of the culture that sustains life and reverses deterioration.

How do they fit into the context of the workplace?

The economic institution, the company, on the other hand, is in the business of making money by producing and delivering quality products and services. Educators free up ideas. Producers free up money. They need each other. But

they need to find ways to serve each other without forgetting which business they are in.

What is the steering committee's role?

The steering committee is in a unique position to create links between educators and producers that free up both ideas and money to renew the culture and the productivity of the company. The key to successful educator-producer relationships is **transparency**: the steering committee has to position itself like a window that allows producers and educators to see each other clearly for who they are. Then you negotiate ways to get them together into fruitful associations.

SERVICE PROVIDERS:

Below is a list of different types of educational service providers. Some of these will be easier for you to access than others. That doesn't automatically make them the best choice for every learning need your teams will have. Many people starting out in Learning Initiative Teams will be looking for someone to play a familiar teacher role. Many service providers are also used to performing this function. However, teaching is only one way to lead out a learner's capacities. As participants are exposed to a broader range of topics, skills and learning options, they will discover other effective ways to learn. That is why the term "service provider" is used instead of "teacher," "instructor," or "trainer." Education is whatever it takes to lead the learner out beyond present capacities to take the next step, and the next, and the next. There are a number of different service providers who are experts at doing "whatever it takes."

Explore the range of educational resources listed and think about a way to start discovering the specific resources available in your community.

- An in-house instructor or facilitator from your training department
- Another in-house learning-coach or mentor who has the needed expertise
- An instructor from a vocational school adult education program
- A local school teacher
- A community college instructor
- A university professor
- Tutors from a community literacy agency
- A public library professional
- A facilitator from a local Labor-Management Committee
- An independent facilitator-consultant

- A person from another company who specializes in the skill or knowledge requested
- A person recommended for particular expertise by the local Chamber of Commerce, trade association, literacy agency or other clearinghouse organization
- An author or vendor of a program or book that addresses the Team's learning goals
- Another team experienced in the requested skill area
- The team implements its own learning activity

ACTION STEP 2. LOCATE AND TALK TO A WIDE VARIETY OF SPECIFIC EDUCATIONAL SERVICE PROVIDERS WHO WORK IN THE LOCAL COMMUNITY

Using the Brainstorm Technique you learned in Chapter Two, brainstorm all the ways you can think of for the steering committee to **research the range of education service providers that are available to you for your workplace learning program.**

After listing everyone's ideas on a flipchart, cluster similar suggestions together. Then prioritize this list and create a plan of action. Assign group members to select specific tasks each will do to carry out the plan. Summarize the group's plan here:

PLAN FOR IDENTIFYING RANGE OF LOCAL SERVICE PROVIDERS AVAILABLE

ACTION STEP 3. ESTABLISH CRITERIA FOR SELECTING SERVICE PROVIDERS TO FACILITATE THE LEARNING OF LEARNING INITIATIVE TEAMS

Definition of a selection criterion:

A selection criterion is a feature or quality that you feel is important for an education service provider to have in order to meet with success in the workplace learning program you are developing. A criterion could also be a rule you want the service providers to follow, a process they must go through, or a task they must accomplish. Service providers who best meet these stated criteria are the ones who will be selected.

Example of a Selection Criterion:

A service provider will be able to collaborate with the Learning Initiative Team on team's learning goals and desired approach.

Sample Contract

You will find a sample contract for service providers on the following pages. Use this Memorandum of Agreement to help you establish the selection criteria for hiring education service providers. By reviewing the points of agreement for each party, and by filling out the GOALS in the first section, the criteria that are important to you should come clear.

This contract is given as a sample only. You may use it as is, revise it, or write a different one that suits your specific needs more effectively. Once the selection criteria are agreed upon, the steering committee may decide to delegate the contract process to one or a few of its members to complete.

(Sample Contract)

MEMORANDUM OF AGREEMENT

Workplace Learning Program
Educational Service Provider

Recognizing the importance of an educated workforce, this organization (name organization) joins with (name educational service provider) as a partner in workplace learning. Our mutual goals are: (list goals, including duration of program)

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____

I/We, _____ (Education Provider), agree to:

- Facilitate mastery of the learning endeavor identified by the Learning Initiative Team that selected me/us, according to the goals and learning approach they have adopted.
- Participate as a member of the steering committee while engaged with the Learning Initiative Team.
- Assess the relevant learning competencies of all Learning Initiative Team members.
- Honor and carry out the confidentiality guidelines established by the steering committee.
- Develop a customized program to meet the learning and work related needs of team members according to Learning Initiative Team guidelines.
- Deliver the learning program.
- Oversee the operation of the program.
- Facilitate the creation of a Learning Initiative Team portfolio that highlights both individual and team accomplishments

- Co-create evaluation procedures with the group and use them to evaluate the team's program and progress toward its learning goals.
- Develop a set of strategies for transferring authority to the learning team so that it moves, by steps, to greater autonomy as a self-sustaining learning unit. (I agree to eventually work myself out of a job so the team can do for itself what I initially do for them.)
- Other _____

The _____ (Organization) agrees to:

- Fully authorize and participate in the steering committee to implement the workplace learning program.
- Form Learning Initiative Teams of employees prepared to participate in learning activities.
- Provide appropriate space, equipment, storage and materials for service provider use.
- Establish and administer clear confidentiality guidelines for educational records.
- Provide appropriate instructional materials for team members.
- Provide release time for Learning Initiative Team sessions.
- Allow and encourage all employees who are eligible to participate regardless of sex, race, creed, national origin, age, lifestyle, or physical challenge.
- Other _____

Organization Representative

Education Representative

Date

Date

Here is a sample list of criteria for workplace education service providers that has been generated by members of the Workforce Basics Consortium. Use it as a starting point for a steering committee discussion to clarify what is most important to this organization when looking for workplace educators.

The Consortium suggests that the kinds of service providers needed are those who can:

1. Build on what adult learners already know.
2. Make teachers and learners equal partners in the learning process.
3. Make the learning environment relevant and authentic in the eyes of the learner.
4. Collaborate with other service providers to deliver multi-faceted programs.
5. Work with and be directed by an in-house, multiple-stakeholder steering group of workers and managers.
6. Perceive and respond to the dynamics of workplace cultures.
7. Bring expertise in the content or process being facilitated.
9. Create linkages in the organization that allow the new learning to be "knitted in" to the daily life --and consequence systems-- of the organization.
10. Link learning with organizational mission and goals so there is a meaningful flow-through between individual progress and the development of the company as a whole.
11. Provide an objective evaluation of one's own program.
12. Be a learner advocate, and bring flexible energy to the tasks at hand.

Discuss together the qualities you would most appreciate in a workplace educator. Identify the criteria that are most important to you. Then prepare a list of your selection criteria and make it available to service providers who are interested in working with Learning Initiative Teams in your organization.

WHAT WE WANT IN A WORKPLACE EDUCATOR

ACTION STEP 4. SELECT SERVICE PROVIDERS

Design a selection process that allows individual Learning Initiative Teams to meet, interact with, and help select their own service providers.

Now that you know what you're looking for in a workplace educator, you can design a process that will allow Learning Initiative Teams to participate with you in the selection of the persons who will be working with them. This can be done in several different ways.

- **A Learning Fair**

Create a learning fair to which you invite an array of independent workplace educators and representatives from literacy and learning institutions and agencies involved in workplace education. Tell them ahead of time about your program, the Learning Initiative Teams, and the specific needs you are wanting them to address.

Set up the learning fair so that Learning Initiative Teams can come and meet, interact with and experience sample "lessons" from the service providers who have responded. Make sure each Learning Initiative Team has genuine choices, adequate opportunity to experience each option, and time to talk informally with each service provider.

Then facilitate each Team as members discuss and select the person, program or agency they want to work with.

- **A Three-way Interview Process**

Another approach would be to set up a three-way interview process. The steering committee designates a sub-committee to interview the Learning Initiative Teams to discover what their priorities are for a service provider.

Then the sub-committee interviews service providers and works to come up with a good match for each Team. They make their recommendations to the steering committee and to the Learning Initiative Teams. These groups make the final decisions.

- **Service Provider Teams**

In some communities, service providers are realizing that they can work together to everyone's advantage. They are forming teams to offer a broad spectrum of educational services to organizations -- much more comprehensive than any one service provider could offer alone. Some agencies, such as the Workforce Basics Consortium in Central Ohio, are beginning to offer the service of putting those teams together in a customized way with a different team for each organization, based on specific needs.

Such a team could be of service to help Learning Initiative Teams know what is available and orient them to a variety of options for their own learning endeavors. Invite the agency to send a team of service providers to talk with your steering committee and/or Learning Initiative Teams and show you what services they provide. Then let the Learning Initiative Teams negotiate with them, as appropriate, to select the kind of help they want.

ACTION STEP 5. ORIENT SERVICE PROVIDERS

No matter how good your instructors, coaches, tutors or mentors turn out to be, the uniqueness of your learning program requires that you orient each service provider to the needs, expectations and outputs required of him or her. This can be done by the steering committee, a person delegated by the steering committee, the individual learning teams, or a combination of these. A service provider orientation should include the following parts:

- An introduction to the **organization**, including its mission, its major departments, its recent accomplishments, current goals and directions, and a tour of the facility.
- An introduction to the **steering committee**, including its mission, the key features of the learning program you have created together, the committee members and their functions, and the nature of the relationship the service provider will have with this committee.
- An introduction to the **Learning Initiative Team** the service provider will be working with, the team's specific expectations and goals for its learning project, and the nature of the relationship the service provider will have with this team.

- A **dialogue** with each service provider to identify and **negotiate** needed space, supplies, and storage, as well as to clarify policies, communication channels, and payment procedures if applicable.
- A way to bring each service provider into the **team process** as a **participant** -- both with the steering committee and with the Learning Initiative Team.

At this point, the steering committee needs to assign the different parts of the service provider orientation process to various members and discuss how this orientation will be carried out. Record the main points of that discussion in the following space.

SERVICE PROVIDER ORIENTATION

Our orientation of service providers will take place in the following manner:

ACTION STEP 6. BRING SERVICE PROVIDERS INTO THE STEERING COMMITTEE PROCESS

Involve service providers in the steering committee process during the time they are working with Learning Initiative Teams.

Make sure there is regular opportunity for feedback between service providers and steering committee after their work with the teams has begun. Describe here how you will ensure this communication happens:

Regular feedback sessions between service providers and steering committee will be accomplished in the following manner:

They will cover the following topics:

This plan will start on (date) _____

CONCLUSION

In this chapter, you have interacted with a number of educational service providers and devised a plan for matching Learning Initiative Teams with people or agencies who can best guide them toward the learning masteries they have identified for themselves. You have developed a contractual agreement with service providers and worked out the details of their interface with your organization. You have considered ways to integrate service providers into your steering committee process and make sure that their needs are met. In the process of negotiating with the service providers who have been selected, you have also worked through a number of the planning decisions necessary for the program to be implemented.

You are now ready to move on to Chapter Seven which will take you through the implementation of the first learning cycle and the coordination of a program evaluation. The results of the program evaluation will help you plan for the second learning cycle of Learning Initiative Team activities.

MASTERY PROCESS #6 TRANSFORMING LEARNING AS USUAL

"Transforming business as usual" is a slogan used by Columbus, Ohio's Workforce Basics Consortium to remind people of its mission to be a change agent in workforce development and education. Mastery Process #6 is a variation on that theme. "Transforming Learning as Usual" challenges Learning Initiative Teams and service providers to work together to transform their old, familiar learning routines into something entirely different. Meeting the unique needs of individual learners in your particular work setting requires fresh thinking, flexible energy, and the creation of new approaches to learning tasks.

Here are some ideas to help you break out of the "learning as usual" mode:

Learn Artistically

Just as it takes more than your hands to really accomplish a new work technique, it takes more than your head to really learn something. In fact, the real key to learning, for adults as well as children, is something we all possess. Besides the impulse to become more enlightened, and the impulse to become more practical, there is also the artistic impulse to play! It is this artistic impulse to play that brings warmth and life to the learning process.

By paying attention to your own artistic impulses, you can put them to work for you to enhance your learning. The most difficult and the most mundane lessons come to life when you start playing with them as if you were an artist experimenting with themes for a new creation.

Effective teachers integrate artistic activity into academic lessons so that students explore and experiment with their learning themes the way an artist would. Adults can learn the rudiments of a number of artistic processes including clay modeling, watercolor painting, drama, group singing, eurythmy movements, and form drawing.[1*] Art forms such as these give people new artistic materials with which to "play into" their various learning endeavors.

Learning Initiative Teams could consider taking an artistic, seriously playful approach to accomplishing their group learning goals. Negotiate with any service provider to include artistic means of exploring the learning content together. Or, invite an artist to help teach reading and math!

* All footnotes will be listed at the end of the Mastery Process.

Become an Author

One of the best ways to learn to write, spell, think, speak and read is to become the author of your own article, story or book. There's nothing like learning by doing! "Authoring" not only builds skills. It also gives you your own voice, so you can speak with "authority" on the issues you care about.

Through several colleges in Central Ohio, Ellen Stukenberg and others have created courses in what's now called "process writing."^[2] These courses are also being delivered to employees in local area businesses. The idea is to engage people in the process of writing on a regular basis, as a way to capture the flow of personal thoughts, images and experiences, ignoring the rules of grammar at first, in order to encourage a stream of words to flow. Eventually, with the proper encouragement and guidance, chaos gives way to order as the person continues to write. A desire for an understanding of grammar is awakened in the individual, in order to clarify what s/he is trying to say. In this way, the technical skill of writing emerges out of the process of writing itself. When an individual becomes an author through this process, much more than writing abilities are awakened. In a sense, each person creates him/herself anew by translating things of personal importance into written form. When that written picture of self is clear enough to be communicated and shared successfully with others, the written language has become a tool through which the new author is now empowered to create whatever is necessary -- in writing.

A Learning Initiative Team could elect to go through a process writing course together, inviting an instructor who has experience in this approach to come in and work with them.

Know Your Work in its Whole Setting

A number of companies now offer courses to employees to help them see the big picture of the work they do. Some have prepared a syllabus of production that lays out the specific work processes in each department so that all employees can know exactly how the products and services flow through the entire operation. In some companies, individual workers are invited to visit other departments, first as observers, and then given opportunities for practical participation. This is just beginning to be common practice today among companies that want a flexible, empowered workforce.

However, these ideas were being practiced by a few enlightened industrialists in 1919, during a very dark time for Europe, in Stuttgart, Germany. German educator Herbert Hahn writes a personal account of workplace learning programs he helped introduce to the workers of the Waldorf-Astoria cigarette factory, based on ideas he learned from scientist-philosopher and social

reformer, Rudolf Steiner. Here is his account of a conversation he had with Steiner:

"The essential thing, he said in effect, was to create for every worker and employee a picture of the *whole* of his work and also of its place and setting in the world... All the employees, male and female, should be told about all the work done in the other departments. They should also be given a picture of the (raw materials used), of the regions where (they are mined or) cultivated, of the civilization in the countries concerned. Over and above this, they should be told about the whole process of the distribution of the finished product and the economic and financial factors involved. Similarly, the salesmen should be made conversant with all the practical work that had gone into the finished product. When anyone who is engaged in some productive work has a picture of the whole process involved, his consciousness is widened and his human interest kindled. He may continue his work in the narrowest of sections, but he feels spiritually linked with all others. The social connection then becomes real to him, and the feeling of detachment is no longer there."[3]

A Learning Initiative Team could decide to take on some aspect of such an education process as a research project. By widening their sense of connectedness to the source, production and destination of their company's products, individuals' specific tasks become more meaningful. In the process of gathering, organizing and disseminating real information, the learning of the prerequisite skills happens as a matter of course. When employees have a clear sense of how their work fits into the whole work of the organization, and how their organization's work fits into the world -- not only economically, but culturally and politically, as well -- then there's a place from which each person can make an intelligent, freely-considered contribution -- and feel like a whole human being.

A service provider for this type of Learning Initiative Team might be a research specialist from a local university; someone, perhaps, in the field of anthropology or ethnography (to help you study your organization as a cultural group); or it could be a team of people within the organization who each specialize in some aspect of the whole picture the group wants to understand.

"You Are Your Child's First Teacher"

A Learning Initiative Team could focus on tactics for parents to help their children learn and grow in healthy ways. For parents with very young children, a book by Rahima Baldwin, *You Are Your Child's First Teacher*, [4] offers practical ideas that are grounded in an understanding of how intelligent, warm-hearted and committed human beings emerge. For parents with older children, a number of approaches could be taken, depending on the specific ages and interests. A "Helping Your Kids with their Homework" Team could help parents fill in their own skills gaps so they can work more confidently with their school age children.

A service provider for this type of Learning Initiative Team might be a parent who is also a learning specialist, or perhaps a parent who is home schooling her children.

Recognize Your Learning Abilities -- even in the Face of Inabilities

When it comes to learning difficulties, President Clinton made a point in his inaugural address that offers a good guideline to follow. He said, "There is nothing wrong with America that cannot be cured by what is right with America." The same can be said for any learner. There is nothing wrong with your learning process that cannot be cured by what is right with your learning process. Recognize what you can do and build from there.

If learners are aware of learning disabilities such as dyslexia, there are things they can do. Instead of covering it over or "limping along," a group of people with learning difficulties could form a Learning Initiative Team to attack the problem directly together. The team can actively research the programs that offer the best help and then participate with confidence in the one they select.

Or, Learning Initiative Teams might discover that some of their members work more slowly or have more difficulty with certain skills than others. One person's difficulty is often another person's strength. When the team discovers the variety of individual strengths it has, the weaknesses simply become focal points for mutual learning. "I read well and have difficulty talking to important people." You are dyslexic and know how to create great business relationships. Let's help each other out." The whole team supports both members as they take new steps toward mastery.

Transform Learning as Usual

The point is to arrive at an object and goal for learning that is vital enough to you as learners that it inspires you to work on the academic and technical skills necessary to accomplish what you set out to do in your learning. When

learning options are dynamic, fun, interesting, artistic, and responsive to individual situations, we tend to participate more readily. You can create learning opportunities that are worthy of the inheritance, and the quest, to be free human beings.

Use your Learning Initiative Teams to transform learning as usual into whatever you need it, and can imagine it, to be.

FOOTNOTES FOR MASTERY PROCESS #6

1. Eurythmy is an art of movement created by Rudolf Steiner. Form drawing is an art form based on Celtic runes. Both are used extensively in Waldorf Education, both for children and adults.
2. Ellen Stukenberg, 158 W. New England, Worthington, OH 43085.
3. Herbert Hahn, "How the Waldorf School Arose from the Threefold Social Movement," *The Threefold Review*, Winter-Spring, 1992-93, p. 30.
4. Rahima Baldwin, *You Are Your Child's First Teacher*, Berkeley, CA Celestial Arts, 1989.

CHAPTER 7. FIRST LEARNING CYCLE AND EVALUATION[1*]

THE LEARNER'S BILL OF RIGHTS (Excerpt)

All learners have the right to:

- Discover how they learn best.
- Choose and use learning processes appropriate to their learning style.
- Communicate personal learning needs to peers and instructors.
- Negotiate with peers and instructors so that personal learning needs are met.
- Identify and pursue their own best learning sequence and pace.
- Present learning results in a form appropriate to their learning style.
- Receive recognition (credit) in a way that honors their individual learning process.
- Learn in a harmonious environment.

- Meg Freeling, *SOUND LEARNING*, 1992

OVERVIEW

The work you accomplished in Chapters One and Two got you ready to implement a workplace learning program. Chapters Three through Six helped you to aim your energies in the direction necessary for successful implementation. You are now at the point where we could say "fire!" because it's time to "do it." But in describing the work required next, it's not a matter of "ready, aim, fire," but rather, "**Ready, aim, plow!**" The "doing" of the workplace learning program is not a "quick shot in the dark," but a slow, steady plowing of fallow ground. If you want learning to happen, plan to be in it for the long haul. If you can sustain what you have begun here, the harvest, in terms of employees' newly awakened learning capacities, can be tremendous.

Chapter Seven provides assistance for implementing and monitoring the first learning cycle, for evaluating the program, and for planning the second cycle of learning activities. It includes a section on learner assessments and one on communicating with supervisors. The Mastery Process, "Burn the Boat," reminds us of the importance of being willing, always, to be a beginner.

* All footnotes will be listed after the chapter.

OBJECTIVES

Working through this chapter, the steering committee will:

1. **Implement the first learning cycle** of Learning Initiative Team activities.
2. **Ensure that individual service providers administer learner assessments** that are appropriate to each team's goals.
3. **Monitor and assist teams** and service providers as they work to achieve their goals.
4. **Communicate with supervisors** and others who have a stake in the Learning Initiative Teams' activities.
5. **Plan the evaluation and collect data** (See Chart on p. 188).
6. **Interpret the data and evaluate the program.**
7. **Plan the second learning cycle** of Learning Initiative Team activities.

ACTION STEP 1. IMPLEMENT THE FIRST LEARNING CYCLE

Once the Learning Initiative Teams have organized themselves, identified team learning goals, and agreed on their respective service providers, they are ready to begin the first learning cycle. The steering committee will need a plan for coordinating the first round of learning sessions. Your plan should include:

WHO	Team rosters , with their respective "champions" and service providers listed
WHY	The steering committee's vision and purpose for the learning program, what it can mean to the organization, and what it can mean to participants
WHAT	A clear communication of program guidelines for team participants
WHEN	A schedule of each team's learning sessions for the first learning cycle – a schedule that all stakeholders help to shape

WHERE Each team should have its own **regular meeting place**, and a voice in its selection

HOW The **logistics**: Identify the tasks that must be completed for the learning sessions to begin, and assign yourselves, as committee members, to these tasks

Use a flipchart to map out your plan together. In the space below, (1) summarize the committee's plan and (2) identify your own assignments.

IMPLEMENTATION PLAN
The First Learning Cycle

The Steering Committee Plan:

My Part in the Implementation Plan:

ACTION STEP 2. FACILITATE LEARNER ASSESSMENTS

Each service provider has their own way of assessing learners, based on their philosophy and program. Each Learning Initiative Team needs to be clear about what they want and what the options are regarding the assessment of their skills. It is up to the steering committee to (1) gather assessment information from the service providers and make it available to the teams beforehand, so they can negotiate intelligently for what they want. The steering committee also needs to (2) educate the learning teams as to the best way to negotiate with their service providers so the team stays in control of its own learning process, and still gets the benefit of the instruction and help the service provider has to offer.

Tests

Employees have the right to know the results and the implications of any assessments or tests they have taken. They also have the right to confidentiality regarding the specific outcomes of their tests and assessments. Service providers can protect learner confidentiality by revealing individual results only to the learner, and translating anonymous scores into group data before sharing it with others in the organization.

There are a number of adult basic skills tests on the market. Some are better than others. When talking with service providers, find out if they use standardized tests or develop their own. If they use standardized tests, ask them which ones they use and why. Get them to show you some tests ahead of time and demonstrate how they use the test results to determine where an individual's learning activities should start.

You might want to consider developing tests of your own. If there are certain fundamentals that are required of all employees, a test customized to your organization could be a useful tool, whether it is used as an entry test, as an orientation for newly hired people, or as a means of upskilling seasoned employees.

Further assistance for developing your own performance-based, workplace tests can be found by calling the Center on Education and Training for Employment, at The Ohio State University, or a similar service agency in your area.

Tests simply provide data for taking action on further learning. Employee test scores should never be used for purposes of job performance evaluation. If they were to be used in that way, it would erode learners' confidence and motivation and force them to take a non-participation stance. The steering committee needs to make sure that both service providers and company management clearly understand and honor the need for confidentiality.

Tests may not be the most accurate or effective means of measuring individual and group learning. Tests have been a standard part of compulsory academic learning for a number of generations, so test-taking is a familiar process and one that is easy to administer. However, testing may not always produce the results that are really wanted. Test-taking is a skill and an art that must be developed like everything else. Some people are good at it, some are not. Perfectly intelligent people sometimes get falsely pigeon-holed because they do not communicate well in a test-taking situation. It is better to assume that most people are intelligent enough. There may simply be barriers to the expression and cultivation of that intelligence that have to be removed.

Another drawback to tests is that they only measure a very narrow band of human capacities -- that which can be coded into the sometimes brittle logic of the test. Beyond the narrow logic of traditional test-taking intelligence, are a rich diversity of other human intelligences. According to Harvard's Howard Gardner (*Frames of Mind: The Theory of Multiple Intelligences*),[2] there are at least seven human intelligences, two of which have dominated traditional teaching in western societies; these are the *verbal/linguistic* intelligence and the *logical/mathematical* intelligence. The five non-traditional intelligences have generally been overlooked in our education. They include: *spatial, musical, kinesthetic, interpersonal, and intrapersonal*. All seven human intelligences have a part to play in becoming master learners in the workplace. Providing opportunities for all seven intelligences to develop and become integrated is a new, essential work for anyone interested in human learning. Creating evaluation processes that reflect the wider human capacities implied here requires new thinking about how human beings tend to demonstrate their most significant learning.

Portfolios

One process that is taking hold in some educational circles is the **learner portfolio**. Based on the artist's portfolio, this collection of the learner's most significant mementos, artifacts and demonstrations of learning is becoming an alternative to traditional test scores as a "ticket" into some jobs, colleges and other more challenging steps the learner chooses to pursue. The Vocational Education Division of the Ohio Department of Education is promoting a version of the portfolio for graduates of vocational high schools.[3]

A portfolio is learner-initiated and learner-controlled. Just as an artist selects which creations to display for prospective patrons and benefactors, so a learner selects which accomplishments to put forward to demonstrate and

provide evidence of personal mastery. Service providers can coach learners on what to include in their portfolios. Learning Initiative Teams who decide to use a portfolio approach will need to agree on what to include in their portfolios and how they want their portfolios to be used. They might consider creating a Team portfolio as well as individual ones.

Performance Assessment

To discover what effects the employee's learning efforts are having on actual job performance, a performance assessment can be used. This can be done through interviews with the employee and the respective supervisor. It can also be done through observation and by peer reviews. With coaching, the Learning Initiative Team can set up their own performance assessments of selected learning masteries, based on goals and standards of performance they create for themselves. When given the opportunity to participate in their own evaluation in this way, team members learn to develop realistic improvement plans for themselves, and can often pinpoint production and work process improvements that save the company money, boost morale and generate a stream of beneficial new ideas.

Issues

The following issues need to be discussed and clarified with (1) service providers, (2) Learning Initiative Teams, and (3) relevant supervisors and managers. The policies, once resolved, need to be clearly communicated up front, so everyone knows the procedures to follow.

- Who will see individual test scores?
- How can they be kept confidential and not inadvertently find their way into employees' personnel files?
- How much of the assessment can be carried out verbally and through portfolio samples instead of through traditional tests?
- How well are employees oriented to the test-taking procedures beforehand?
- In what ways are specific learning styles, differing time needs, and preferred learning environments taken into account?
- What is the plan for follow-up with each team member regarding assessment results?

- How much influence does the team member have in shaping the assessment process?
- How might portfolios be used as an assessment tool?

Discuss the above issues with the steering committee and design an assessment policy and procedure that address these issues to everyone's satisfaction. Then write the highlights of your policy and procedure here:

POLICY AND PROCEDURE FOR INDIVIDUAL LEARNER ASSESSMENT

ACTION STEP 3. MONITOR AND ASSIST TEAMS

The steering committee plays the role of "midwife" to the Learning Initiative Teams throughout the first learning cycle. Constant attention and support are necessary. There needs to be a dependable system of two-way communication between each team and the steering committee throughout the "birth" and early life of a team.

According to organizational expert Peter Drucker, one organization known for developing strong leaders attributed their success to the following policy. [4] They tried to provide four types of support to the learners who came forward to participate in their program:

1. A mentor to guide him or her
2. A teacher to develop skills
3. A judge to evaluate progress
4. An encourager to cheer them on

The leader who devised this system said, "I am the encourager. Nobody else can really do that except the person at the very top. It's an urgently needed source of help to these young people because I want people to make mistakes. They can't develop otherwise. So when they fall flat on their faces, somebody has to pick them up and say, go on. That's *my* role." [5]

If this kind of support could be provided to Learning Initiative Teams, they would thrive. To whatever extent possible in your organization, try to provide each learning team with the support of the four functions of Mentor, Teacher, Judge, and Encourager. In designing your monitoring system, remember that purposeful, personal connections with individuals and teams work best. This four-fold system needs to be consciously planned, judiciously assigned, and sincerely carried out if it is to be truly effective.

Note: The service providers can play one of the four roles for the learning team, but do not expect them to perform all four functions. People in the organization need to be involved in directly supporting the learning of the teams as much as possible. The four roles described above suggest a place to begin.

As a group, design a plan for monitoring the teams during their first learning cycle and summarize it in the space provided:

PLAN FOR MONITORING THE LEARNING TEAMS

ACTION STEP 4. COMMUNICATE WITH SUPERVISORS

Just as regular, two-way communication is important between Learning Initiative Teams and the steering committee, so is it essential with supervisors and other people who will be affected by team members' participation in the learning program. When all the stakeholders are included in the communication loop, it is much easier to deal with issues ahead of time and prevent them from becoming problems.

The way to work with supervisors and others who need to be brought into the communication loop is to ask the question, "What do you want to tell me?" Not "This is what I am telling you." Peter Drucker explains,

"That question brings problems out in the open. And the funny thing is that most of the problems that bother people so much turn out to be non-problems when you bring them out in the open. A friend of mine calls them 'pebbles in the shoe' for which you don't need an orthopedic surgeon. The two-way relationship converts a lot of problems into pebbles in the shoe."[6]

As a steering committee, identify the supervisors of the learning team participants and others whose feedback you need. Then agree on a way to maintain regular two-way communication with each of them. Select a few key "check-in" themes and write a question for each theme. Outline your plan here:

PLAN FOR COMMUNICATING WITH KEY PEOPLE

KEY PEOPLE

WHO WILL STAY IN TOUCH WITH THEM? WHEN?

KEY THEMES AND QUESTIONS:

ACTION STEP 5. PLAN EVALUATION AND COLLECT DATA

"If we are to achieve a richer culture, rich in contrasting values, we must recognize the whole gamut of human potentialities, and so weave a less arbitrary social fabric, one in which each diverse human gift will find a fitting place."

- Margaret Mead, 1901-1978

Just as a jeweler can price a diamond by (1) examining the size, shape and shine of all its facets, and by (2) noticing how well it fits into its setting, so you can create a good evaluation by (1) examining all the facets of your workplace learning program and by (2) noticing how well it fits into the setting of the organization.

The Holographic Evaluation

The accompanying chart, "Evaluating Our Workplace Learning Program," (p. 188) describes four facets of the workplace learning program that need to be examined. They include:

- (A) the work of the **Steering Committee**
- (B) the accomplishments of the **Learning Initiative Teams**
- (C) the effectiveness of the **Service Providers** and
- (D) the program's impact on the **Organization** as a whole.

This is called a **Holographic Evaluation** because the guiding principle is based on one of the properties of a hologram. A hologram is a three-dimensional picture created by recording on film the pattern of interference formed by a split laser beam (projected onto an object), and then illuminating the pattern either with a laser or with ordinary light.[7] One interesting property of this laser-created image is that any small part of the recorded interference pattern will reveal an image of the whole when a laser light is directed through it. In other words, the part contains the whole.

But the image that comes through one small part is shadowy and out of focus. When the entire photographic plate of the interference pattern is used -- that is, when all the parts are illuminated by the laser -- the resulting hologram is clear, bright and sharp. Even though a laser is able to produce a picture of the whole by shining through only one part, the benefit of using the combined "feedback" from all the parts is that you get a more refined, detailed, and life-like three-dimensional image of the whole object.

Evaluation Process for BECOMING MASTER LEARNERS IN THE WORKPLACE:

Evaluating Our Workplace Learning Program

Effectiveness of Steering Committee

- Its own Process & Output
- Success of whole program

- > What have we done well?
(intended and non-intended)
- > What has not been working?
- > What do we need to do differently?
- > What action plans can we commit to?

Impact on Organization's Goals and Objectives

- Management evaluates itself
- Management evaluates whole

The Evaluation Hologram

- Each part evaluates its own performance
- Each part evaluates the program's impact on the whole organization
- The evaluation hologram is a synthesis of the views from all the parts

Learning Initiative Team
Evaluations of Personal Mastery,
Achievement of Team Goals, the
Service Provider, the Steering
Committee Process, and the
program as a whole

Service Provider
Evaluations of Self,
Individual Learners,
Learning Initiative Team,
Steering Committee process
and the Program as a whole

Similarly, if any of the four organizational groups listed above were asked to evaluate the whole workplace learning program, you would get a picture of the whole, but it would be blurry and undefined. But if all four of those groups were asked to evaluate, not only their own parts, but also the whole program, and those pictures of the whole were combined into a single image, the resulting picture would be much clearer, more accurate and well-defined than any one group's interpretation would be. The guiding principle of the Holographic Evaluation, then, is as follows:

THE HOLOGRAPHIC EVALUATION

For a clear and accurate evaluation of a program, let all participant and stakeholder groups (1) evaluate the performance of their own group, and (2) evaluate the performance of the program as a whole. (3) Then combine all those single-perspective evaluations into a holographic evaluation that reflects the multiple perspectives of all participants and stakeholders. This will result in the most accurate, high-resolution picture of the program being evaluated.

The Holographic Evaluation follows this general format:

- All stakeholder groups evaluate their own part in the program
- Each stakeholder group evaluates the whole program
- A neutral outsider facilitates the process and compiles the results

The stakeholder groups in this program include:

- A. Steering Committee
- B. Learning Initiative Teams
- C. Service Providers
- D. Top Management & other representatives of the organization

A neutral facilitator

For best evaluation results, a neutral facilitator is recommended. The role of the neutral facilitator is three-fold. This person or team will:

1. Coordinate the evaluation process from an objective, neutral orientation, and keeps the various players generating the necessary information.
2. Help to identify and elicit the kinds of responses that will provide meaningful feedback data.

3. Help to translate the information into a "holographic" image of the program that can be used to plan the next cycle of learning activities.

Look for a facilitator who has developed the art of eliciting, listening and responding to all participant and stakeholder groups with sensitivity and fairness. Look for someone who has the breadth of vision to see the whole dynamic of the program you have designed. And look for someone who can help you organize all the parts of the evaluation into an accurate holographic picture of your workplace learning program.

The neutral outside facilitator could be:

- The person or group who facilitated your needs assessment
- An organizational development expert from the local community
- A team of workplace learning experts from a university, a union, etc.
- An in-house manager who has been least involved in the program
- A team of employees and managers who have been least involved

What does it mean to evaluate?

The word "evaluate" means "to examine and judge carefully to determine worth, significance or value." [8] An evaluation gives you the opportunity to re-visit the needs assessment and decide if you're doing what you set out to do. It also gives you a chance to look at your original mission and objectives and see how far you've come. As a continuing diagnosis, an evaluation enables you to decide what to do next.

How are we doing?

A program evaluation asks and answers five basic questions:

- **How are we doing?** (the over-arching question)
- What have we done well?
- What hasn't been working?
- What do we need to do differently?
- What action plans can we commit to?

If each of the four identified stakeholder groups could answer these five questions and provide data to substantiate their answers, you would have the data you need for the evaluation.

How to find out

To examine what you have accomplished, you will need to collect some data. It's good to remember, however, that this data is only for the purpose of

taking further action. Look at the program goals you wrote in Chapter 3 on page 90. Also review the Educational Profile that summarized the needs assessment. Each goal now needs to be tested out in order to evaluate progress. Ask yourselves: Did we accomplish this goal? How will we know? The latter question, "How will we know?" will tell you what kind of information you need to gather.

Just as you discovered in the needs assessment, there are several ways to collect the information you need. In the spirit of the Holographic Evaluation, try to use several different data gathering processes so that you get a more complete and exact picture of your program. Data can be gathered through:

- Interviews
- Observations
- Focus groups
- Review of participant portfolios
- Comparison of pre- and post-test data
- Feedback questionnaires

Discuss with the steering committee the most important things to include in your evaluation of the workplace learning program, and create a plan together. Highlight key elements in the space provided.

OUR PLAN FOR A HOLOGRAPHIC EVALUATION

ACTION STEP 6. EVALUATE THE PROGRAM

As a steering committee, work with the facilitator to carry out the evaluation process you have planned. Identify steering committee members who will be responsible for collecting the necessary information on the four different

aspects of the program (learning teams, service providers, steering committee and organization as a whole). Identify which type of information gathering will be used with each (interview, observation, focus groups, etc.). And plan when and where the data collection will take place.

EVALUATION LOGISTICS

LEARNING FROM THE EVALUATION DATA

Once the information has been compiled, it is important to review the evaluation data as a whole steering committee so that the perceptions of everyone are expressed and considered.

Here are some questions to keep in mind as you evaluate the learning program and its accomplishments:

- What have we done well -- either intentionally or unintentionally?
- Who emerged as potential new Learning Initiative Team leaders?
- What new learning needs became apparent?
- Which Learning Initiative Teams should be continued?
- What changes would enliven any of the people who got discouraged?
- How are the Literacy Initiative Teams interfacing with production work? Are there issues that need to be resolved?
- Are some groups in the organization responding more than others?
- Are there additional people who could be invited to join your steering committee?

- Which parts of the preparation for the first learning activity cycle need to be repeated for the second cycle?
- Which steering committee member(s) will facilitate the second cycle of learning activities?
- How will you acknowledge the participants in the first Learning Initiative Teams? (What sort of acknowledgement would be most meaningful to them?)
- Are there new organizational goals that will influence learning goals?
- What is the best way to streamline the Learning Initiative Team process so that it becomes even more effective, dynamic and interesting?

Out of your discussion of the above questions, highlight the most important things you learned from the evaluation of the first learning cycle. Then identify the actions that would help the second learning cycle get off to a successful start.

WHAT WE LEARNED FROM THE EVALUATION

LIST PREPARATORY ACTIONS FOR THE SECOND LEARNING CYCLE

ACTION STEP 7. PLAN THE SECOND LEARNING CYCLE

As you plan the next cycle of Learning Initiative Team activities, keep the following needs and questions in mind:

1. How can you make it easy and natural for more people to initiate their own learning activities?
2. How might you use Learning Initiative Teams to involve people in cross-training efforts?
3. What are some ways for hourly employees, staff and managers to work together as peers on a learning project?
4. How can you create ways for the bystander role to become a legitimate entry into learning activities?
5. How can you more fully integrate learning goals with organizational goals?
6. In what ways might you integrate learning goals with outside interests and family life?

After discussing the above questions, establish two or three action plans to further your preparation for the second cycle of Learning Initiative Team activities. These should be the most important actions that are needed now -- actions to which the steering committee can make a strong commitment.

ACTION PLANS

For each plan, identify (1) What & Why, (2) Who & How, and (3) Where & When.

ACTION PLAN NO. 1

ACTION PLAN NO. 2

ACTION PLAN NO. 3

SECOND LEARNING CYCLE OUTPUTS

Before the next cycle of Learning Initiative Teams begins, the steering committee needs to decide:

- New learning components
- Process for gathering new Learning Initiative Teams
- Process for matching service providers with learning teams
- Schedule for Learning Initiative Teams and steering committee meetings
- Orientation of team members (new and returning)
- Orientation of service providers (new and returning)
- Evaluation of second cycle of activities

- How to maintain steering committee continuity over time

CONCLUSION

The steering committee is now ready to facilitate the second learning cycle on its own, with consulting services available as needed. It is important for the steering committee to establish an on-going process and structure for the continued coordination of the workplace learning program that has been created.

Congratulations, and good working!

FOOTNOTES FOR CHAPTER SEVEN

1. Dr. Johanna DeStefano, Professor of Language and Literacy at The Ohio State University, and Michael Colburn of Colburn and Associates are gratefully acknowledge for helping me clarify ideas and approaches for this chapter.
2. Bruce Campbell, "Multiple Intelligences in the Classroom," *In Context*, No. 27, p. 12.
3. Eastland Vocational Schools, Groveport, Ohio, Professional Workshop, Fall, 1992.
4. Peter F. Drucker, *Managing the Nonprofit Organization: Principles and Practices*, Harper Collins, 1990, p. 148.
5. *ibid.*
6. *ibid.*, p. 159.
7. *American Heritage Dictionary, Third Edition*, Houghton-Mifflin, 1992.
8. *ibid.*

MASTERY PROCESS #7 BURN THE BOAT

John Rollwagen, chairman and CEO of Cray Research, a very successful manufacturer of supercomputers, tells this story about Seymour Cray, the brilliant and reclusive inventor of the first supercomputer and the founder of Cray Research.

"Seymour lived on a lake in Wisconsin, and he would pass the long winters there by building sailboats. Some of them were pretty big. In fact, the last one he built was 36 feet.

"But at the end of the summer he wanted to dispose of the boat because he had so many ideas about the new boat he wanted to build.

"And so every fall, he would have a party--a cookout on the beach with a big bonfire. He'd encourage people to dance around the fire, and at a certain point they would burn the boat. Just burn her right up!

"I think Seymour burned the boat each year because he wanted to start over again with a clean piece of paper and build a better boat. He was a constant, constant beginner. I tell that story a lot at Cray [Research Company] to remind us how important it is to begin again." [1*]

Be always a beginner

Rollwagen also likes to quote the poet Rilke who said,

"If the angel deigns to come, it will be because you have convinced her, not by your tears but by your humble resolve to be always beginning, to be a beginner." [2]

When it comes to masterpieces that we have created, it takes great courage to "burn the boat." Yet Seymour Cray burned his masterpiece every fall amid great celebration because he had deep confidence in -- and commitment to -- his own capacity to build a better boat. As we near the end of this manual, the mastery process of *burning the boat* offers the challenge to celebrate everything you have accomplished in the first learning cycle of this program, and then to *let it go*, so you truly begin again fresh when you start the second

*Footnotes will be noted in brackets and listed at the end of the Mastery Process.

learning cycle. Each time you finish a learning cycle there is a similar opportunity to celebrate the accomplishment and then "burn the boat," so the new one can be built by "beginners."

Backwards Remembering

The poets and people of wisdom know how difficult it is for adults to keep becoming beginners. There are a number of exercises and techniques developed to help us with the letting-go process required for burning the "boat" of our own endeavors. One such exercise is similar to the process old Scrooge went through in Dickens' story, *The Christmas Carol*. He did what some teachers call "Backwards Remembering." This is what you do when you review your day --or your life-- as if it were a film you were watching in reverse. You start with the present moment, remember what you did just before now, then what you did before that, and on back till you get to the beginning of the events you are trying to remember.

You will probably want to do Backwards Remembering silently, but you can also do it out loud, and it helps to do it together, especially when several people have shared the same experience. Just like a video camera, your Backwards Remembering pictures the events as they actually occurred, to the best of your memory's ability. If Seymour Cray were practicing Backwards Remembering before he burned his boat, he might picture himself UN-building his boat. First, he would picture himself putting on the finishing touches. Then he would watch himself mounting the hardware, installing the appliances. Before that he might be sealing everything with varnish; then he would see himself laminating the sides. In this way, he would remember the whole sequence in reverse till he was reviewing the plans in his basement, wondering if this new boat he wanted to build would fit in that space.

Children understand the principle of Backwards Remembering. In her interviews with children about current issues, Suzanne Becker prompted one group with this problem: "A lot of countries are getting rid of their weapons. But some of the weapons, like tanks, were built so that nothing could destroy them. What should the leaders do with indestructible tanks?" One eight-year-old girl replied, "They put them together, didn't they? They must have the instructions somewhere. Just get the instructions out and do it backwards." [3] Backwards Remembering could prove useful in a number of ways!

The interesting thing about Backwards Remembering is that, if you can really do it, you find that it is easier to let go of the events you remembered, because you've somehow captured the essence and you no longer need the outer

"stuff" to remind you of your experiences. Thus, you can put the old to rest and begin again without a lot of excess baggage.

The Wall

Another way to develop Beginner's Mind is to realize that, when dealing with complexity, there simply is no single, authoritative "right answer." Peter Senge describes a group exercise that helps people experience this for themselves. Here's what you do: Cover a wall with blank paper and work as a group to map out all the feedback relationships in a particular problem with which you are wrestling. You could say, "Let's create a systems diagram to figure out how to balance our work and family responsibilities." Then you might start by identifying key variables and writing them on different parts of the large paper: time pressures, expectations of oneself, responsibilities, personal interests, career goals, distance between work and home, etc. Then you start suggesting feedback links: expectations influence career goals; personal income influences independence, as well as budget; distance between work and home influences time available for family. Soon circles and arrows cover the wall. People start to feel overwhelmed and come to realize that no-one could possibly figure out all these interactions. Senge says,

"This realization has a remarkable impact on people. Some try to rationalize it away, 'Well, this is so obvious it's meaningless.' They say, 'What's the point?' Others insist that, given enough time, they could eventually figure it out. Some diehards keep trying to add links and loops. But those who can face the "un-figure-out-able-ness" of it all will often sit back in their chairs, laugh, and realize some spring has sprung." [4]

When a certain group of international experts was doing the "Wall" exercise, focusing on the causes of global hunger, one participant was an experienced lobbyist on food and peace issues. At one point, she seemed so overwhelmed that the group leader thought she was ill. The lobbyist said, "No," and responded, "All my life, I assumed that somebody, somewhere, knew the answer to this problem. I thought politicians knew what had to be done, but refused to do it out of politics and greed. But now I realize that nobody knows the answer. Not us, not them, not anybody." [5]

Painful though it may be for those of us who are used to having parents, teachers, bosses -- SOMEBODY -- around who "knows the answers," this realization that nobody has the answers is actually a very liberating way for a group to reach "Beginner's Mind." As one vice president of a Boston-based high-tech company said, "To search for understanding, knowing that there is no ultimate answer, becomes a creative process -- one which involves rationality but also something more." The answer is, at best, an

approximation and always subject to improvement, never final. Beginner's Mind is a state of openness that allows creativity, curiosity and personal responsibility to resurface. It's an attitude that allows us to come to peace with knowing that we do not know -- and that nobody knows. This frees us to begin as beginners together to create the best solution we can, given who we are right now.

What Next?

Burning the Boat makes it possible to squarely face the question, "What next?" To Burn the Boat is to be open, clear and ready to begin again, and again and again, letting go of the last version so the new one can be radically better. Notice that it's not a matter of giving up boat-building, if boat-building is what you love. It is simply a matter of releasing the last effort to make room for a bold new design. May each new learning cycle you design be created from Beginner's Mind. And may you find your own rituals for "Burning the Boat."

FOOTNOTES FOR MASTERY PROCESS #7

1. Patricia A. Galagan, "On Being a Beginner: An Interview with John Rollwagen," *Training and Development*, November 1992, pp. 30-38.
2. op. cit., p. 31.
3. Suzanne Backer, *The All Better Book*, N.Y., Workman Publishing, 1992, pp. 6-7.
4. Peter Senge, *The Fifth Discipline: The Art and Practice of the Learning Organization*, pp. 281-281.
5. Ibid.

GLOSSARY

Key terms used in this manual mean certain things in the context of this learning program that may be different from popular usage. These terms and their meanings are given below.

BASIC SKILLS	Human capacities for using words, numbers and other symbols, to create, acquire and transform knowledge, so that successful and satisfying work can be done.
CAPACITY	A widening of the possibility for action. The ability to accomplish something in such a way that a beneficial new habit or quality is formed. Examples: an expanded capacity for openness, or a new capacity to see all group members' needs. One can also develop a new capacity for skills such as spelling, statistics or clear speaking. Recent reports suggest that production capacity is dependent on human capacity.
EMPOWERMENT	"The practice of helping employees take ownership of their jobs so that they take personal interest in improving the performance of their organization." (William Byham, ZAPP!)
GROUP FUNCTIONS	Three primary group functions for semi-autonomous learning (and work) teams include: (1) Leader Function, (2) Organizer Function, and (3) Producer Function. These functions can be held by a variety of people in a work team as the need arises. When the group keeps all three functions alive, active and balanced, the group succeeds, learning happens, work gets done, goals are achieved., and group synergy emerges.
LEADER FUNCTION	In a group or team, the leader function is that which identifies what the group is there to accomplish, why that is important, and what direction to take to begin. Leaders see and communicate the overview, set the structure and stay focused on the unifying vision and values that motivate the group.
LEARNING	The transformation of perceptual information into new capacities.

LEARNING COMPONENT	A subject to learn; a process, skill or understanding that a group wants to master. The content of study selected by a Learning Initiative Team.
LEARNING CYCLE	A six to eight week period during which Learning Initiative Teams meet regularly to participate in their selected learning activities.
LEARNING INITIATIVE TEAM	A group of people who come together to explore, learn and master a particular subject, process, skill or understanding.
LITERACY	The elements of learning that have to do with creating, acquiring and transforming knowledge through the word and number systems encountered in the reading, writing, speaking and problem-solving practiced in one's society.
MASTER LEARNERS	People who have worked through the process of their own learning so thoroughly that they transform whatever comes to them into new capacities.
MASTERY	A level of skill that goes beyond technique to an artistry that allows masters to bring more of themselves to their work so that masterpieces emerge.
NEEDS ASSESSMENT	Techniques and processes for discovering the learning components most needed in a particular organization, both immediately and in the near future. A needs assessment identifies (1) the skills and competencies currently required by the work being done, (2) the areas of learning the present workforce is motivated to undertake, and (3) the capacities that will be required of workers in the near future. A needs assessment is an up-front evaluation that sets the tone for the learning that will follow. Voluntary focus groups, exemplary employee studies, work document analysis, and informal peer interviews are recommended needs assessment processes. Compulsory testing can often do more harm than good.

ORGANIZER FUNCTION

In a group or team, the organizer function is that which identifies how group members will relate to each other to accomplish tasks, plan who will do them, and decide how all the components fit together. Organizers communicate with all the people, create interconnections and relationships, and find ways to make the work fun and exciting.

PRODUCER FUNCTION

In a group or team, the producer function is that which identifies the practicalities of a task or project: where it will happen, when it will start, what details need to be taken care of in order for all the resources and people to be in place appropriately, and the specific responsibilities required of everyone to get the job done well. Producers are most comfortable doing the work in the first place and want to make sure others can be depended upon to do their part so the whole will emerge in a coordinated and efficient manner.

QUALITY

Excellence in the design, delivery and performance of products and services. Total Quality Management seeks to improve quality through employee involvement in continuous improvement techniques and organizational restructuring to realign the work of production more directly with customer demands. Quality improvement has become a fulcrum for transforming organizations.

S.C.A.N.S.

Secretary's Commission on Achieving Necessary Skills. The Department of Labor, under Secretary Lynn Martin, developed a list of 5 workplace competencies and 3 foundations which they recommend as essential "curriculum" for both school and workplace. (See box on page 40)

SERVICE PROVIDER

A facilitator, learning coach or instructor for a Learning Initiative Team. Service providers are selected by each team from in-house training personnel, educators from local vocational schools and colleges, literacy agencies, consultants, and other community resources.

SEVEN SKILL AREAS
OF A.S.T.D.

The American Society for Training and Development recommends seven workplace basic skill areas for workforce training, based on a national study by Tony Carnevale, "Workplace Basics: The Skills Employers Want." (See box on page 42)

STEERING GROUP

The design and implementation team, made up of representative managers, union, staff, supervisors and front line workers, responsible for creating and sustaining an on-going learning program.

TEAM

A group of people who organize themselves around a common vision, process or task. Semi-autonomous learning teams and semi-autonomous work teams demonstrate new levels of high-performance potential when the appropriate group dynamics and organizational supports are mastered.

TRANSFORMATION

An inside-out reversal that opens up new capacities and makes new modes of functioning possible. Like the metamorphosis from tadpole to frog or caterpillar to butterfly, transformation occurs when individuals and organizations shift into a different operating mode because new organs of perception and understanding awaken. Often used in reference to organizations (and individuals) going through an inner restructuring process.

WHOLENESS

A movement that encourages a shift away from thinking about individual parts of things to a new emphasis on starting from the whole. Total Quality Management in business, the Whole Language Approach in education and Systems thinking in science and technology are some examples. Learning for wholeness is a major theme in educational reform efforts.

WORKFORCE
DEVELOPMENT

Expanding the learning capacity of the workforce so that people can master new work processes, expand thinking and communication abilities, and apply their human talents more fully to improving the production and distribution of goods and services, and to increasing opportunities for meaningful work.

DIRECTORY OF EDUCATIONAL SERVICE PROVIDERS IN CENTRAL OHIO

**Migration and Refugee
Resettlement Services**
Catholic Diocese of Columbus
 197 E. Gay Street
 Columbus, Ohio 43215

Contact: Jane McGrew
 (614) 228-1121

**Center on Education and Training
for Employment**
 1900 Kenny Road
 Columbus, Ohio 43210

Contact: Sandra Pritz
 (614) 292-4353

**Columbus Area Labor-
Management Committee**
 3620 N. High Street, Suite 306
 Columbus, Ohio 43214

Contact: Thomas Kruglinski
 (614) 263-2044

Columbus Literacy Council
 1200 W. Broad Street
 Columbus, Ohio 43222

Contact: Karen Oberrath
 (614) 275-0660

Columbus Metropolitan Library
 96 S. Grant Avenue
 Columbus, Ohio 43215

Contact: Joseph Fowler
 (614) 645-2750

Columbus Public Schools
 Community Education
 North Adult Center
 100 Arcadia Avenue
 Columbus, Ohio 43202

Contact: Carol French
 Workplace Literacy
 (614) 365-6000

Jim Ries
 Adult Basic & Literacy Education
 (614) 365-5136

**Columbus State Community
College**
 550 E. Spring Street
 Columbus, Ohio 43215

Contact: Sharon M. Woodard
 Basic Skills/GED
 (614) 227-5315

Pam Merrill
 Business and Industry
 Training Division
 (614) 227-5425

Columbus State Community College
550 E. Spring Street
Columbus, Ohio 43215

Sue Hiser
Dislocated Worker Program
(614) 227-5485

Eastland Vocational School District
Adult Education
4465 S. Hamilton Road
Groveport, Ohio 43125

Contact: William A. Bussey
Director
(614) 836-3903

Mary Jo Balistreri
ABLE Coordinator
1-800-686-3336

EXCELL Learning Center
Columbus Urban League
700 Bryden Road
Columbus, Ohio 43215

Contact: Ann Fornataro
(614) 221-0544

Literacy Initiative of Central Ohio and READ Hotline
99 N. Front Street, Room 4
Columbus, Ohio 43215

Contact: Edie Poling
(614) 645-6476

Office of Workforce Development
Ohio Bureau of Employment Service
145 S. Front Street, Room 678
Columbus, Ohio 43215

Contact: Len Proper
(614) 466-0582

Ohio Department of Education
Division of Vocational and Career Education - JTPS
65 S. Front Street, Room 915
Columbus, Ohio 43266-0308

Contact: Karen Jesko
(614) 466-3900

Ohio Industrial Training Program
Ohio Department of Development
77 S. High Street
P.O. Box 1001
Columbus, Ohio 43266-0101

Contact: Steve Tirpak
Training Coordinator
(614) 752-4192
1-800-848-1300

The Ohio State University
College of Education
257 Arps Hall
1945 N. High Street
Columbus, Ohio 43210

Contact: Johanna DeStefano, Ph.D.
Professor of Language
and Literacy
(614) 292-8033

Kevin Freer
Adult Education
(614) 292-5037

Private Industry Council #16
Research and Development
400 E. Town Street, Room 220
Columbus, Ohio 43215

Contact: Kenneth Krist
Manager
(614) 228-3907

Private Industry Council #17
P. O. Box 230
Circleville, Ohio 43113

Contact: Kathy Fowler
(614) 474-7518
or 1-800-759-1599

Project Power
City of Columbus
90 W. Broad Street, Room 121
Columbus, Ohio 43215

Contact: Abbie Amos
(614) 645-6404

Ready to Read, Inc.
1066 N. High Street
Columbus, Ohio 433201

Contact: Mindy Fenholt
(614) 299-7323

South-Western City Schools
2975 Kingston Avenue
Grove City, Ohio 43123

Contact: Gail Morgan
Coordinator, ABLE
(614) 875-2318

United for Adult Literacy
c/o ABLE Program
100 Arcadia Avenue
Columbus, Ohio 43202

Contact: Jim Ries
(614) 365-5136

Windsor Terrace Learning Center
1552 Brooks Avenue
Columbus, Ohio 43211

Contact: Janie Heaphy
(614) 294-9500

Workforce Basics Consortium
P. O. Box 12182
Columbus, Ohio 43212

Contact: Mr. Kim Stands
(614) 645-7371

**DIRECTORY OF ORGANIZATIONS
with
WORKPLACE LEARNING PROGRAMS**

Columbus area organizations that have started workplace literacy programs:

Franklin International, Inc.
2020 Bruck Street
Columbus, Ohio 43207

Contact: Peggy Tampson
Training Manager
(614) 445-1413

General Motors Corporation
Inland Fisher Guide Division
and UAW Local 969
200 Georgesville Road
Columbus, Ohio 43328

Contact: Mark Pierce
Training Department
(614) 275-5000, ext. 5130

Bob Pennington
Shop Committee Chairperson
UAW Local 964
(614) 275-5000, ext. 5724

The Kobacker Company
6606 Tussing Road
Columbus, Ohio 43216

Contact: Yvonne Justice
Education Coordinator
(614) 863-7400

Mt. Carmel Hospital
793 W. State Street
Columbus, Ohio 43222

Contact: Pat Adams
The Learning Line
Center for Human Empowerment
(614) 225-8091

Mary Buckley, Director
Career Development
and Enrichment
(614) 225-8091

Project Power
City of Columbus
90 W. Broad Street, Room 121
Columbus, Ohio 43215

Contact: Abbie Amos
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(614) 645-6404

Riverside Hospital
3732 G Olentangy River Road
Columbus, Ohio 43214

Contact: Maryanne Baum
Human Resources Development
Planning Department
(614) 566-5000

Ross Laboratories
585 Cleveland Avenue
Columbus, Ohio 43215

Contact: Nancy Bandman
Training Specialist
(614) 624-7677

THE GOVERNOR'S WORKPLACE LITERACY AWARDS

The following Ohio companies have received the Governor's Workplace Literacy Award for their programs:

1991 HONOR ROLL

American Electric Cordsets
Apple Creek, Ohio

Chrysler/Jeep Assembly Plant
(with UAW Local 12,
The University of Toledo
and the Toledo Area
Private Industry Council)
Toledo, Ohio

City Machine and Wheel
Stow, Ohio

Ethicon, Incorporated
Cincinnati, Ohio

Horsburgh & Scott Company
Cleveland, Ohio

The Toledo Hospital
Toledo, Ohio

1992 HONOR ROLL

ADALET PLM
Cleveland, Ohio

General Motors Powertrain Division
Toledo, Ohio

Gibson Greetings, Inc.
Cincinnati, Ohio

Northeast Ohio Regional Sewer District
Cleveland, Ohio

University of Cincinnati and the
University of Cincinnati Hospital
Cincinnati, Ohio

FOR FURTHER READING

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